

CIRCULATION  
WORK IN  
PUBLIC LIBRARIES  

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FLEXNER













## LIBRARY CURRICULUM STUDIES

Prepared under the direction of W. W. Charters



# CIRCULATION WORK IN PUBLIC LIBRARIES

By

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CHICAGO  
AMERICAN LIBRARY ASSOCIATION

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Printed in the U. S. A.

TO MY FATHER

*On his seventieth birthday*





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## Director's Introduction

In presenting this text as the first prepared in connection with the Curriculum Study of the American Library Association, it may be of interest to describe briefly the methods used in producing this textbook as an illustration of the techniques which are utilized throughout the series.

The administration of the group of texts is controlled by the American Library Association through its Board of Education for Librarianship, its Editorial Committee, the Advisory Committee of the Curriculum Study, and special committees for each of the texts.

When the American Library Association invited the director to supervise the writing of the texts, an advisory committee of librarians in which the faculties of library schools were heavily represented was appointed by the Board of Education to give advice upon matters of policy and details. A staff of two trained librarians, Harold F. Brigham and Anita M. Hostetter, was then selected to care for the necessary work of collection of data and revision of text material. At the proper time a group of prospective authors was named by the Editorial Committee of the American Library Association with the advice of the Advisory Committee, and from these Miss Flexner was selected.

The steps involved in the preparation of the text were the following: *First*, a thorough analysis of the duties and traits of circulation librarians was made by the staff by means of the methods customarily used in such an undertaking. *Second*, the literature on methods of performing the activities was canvassed. This task was quickly completed for the reason that circulation methods had been but scantily recorded in print. *Third*, visits by the staff were made to over fifty libraries conveniently situated and possessed of a reputation for outstanding or substantial circulation activities. From these libraries information was collected in very great de-

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tail concerning the one hundred or more duties performed in the circulation department. By this means a mass of progressive methods which had not heretofore been collected was assembled. These methods were tabulated and prepared for the use of the author by the members of the staff.

*Fourth*, during the spring and summer of 1926 the author worked at the Curriculum Study headquarters and wrote the first draft of the text, with the continuous assistance of the staff. *Fifth*, when the first draft was completed, mimeographed copies were distributed among the library schools to be used as textbooks in their classes for the purpose of securing first-hand criticisms and suggestions. Other copies were reviewed and criticized by circulation librarians and chief librarians in many public libraries. From these sources very useful and unusually intelligent, though sometimes conflicting, criticisms and suggestions were secured. *Sixth*, the author, once more established at the Curriculum Study headquarters, organized the suggestions and in the light of these and her own experience in teaching the text, completely and thoroughly revised the first draft with the staff's assistance. The text was thus polished into final form and released for publication.

In the preparation of the text it seemed advisable to prepare as a supplement a series of practice sheets for ten of the most important routine duties. These are essentially self-teaching forms and are intended to lighten the teaching load. They were prepared by W. F. Rasche, who has had extended experience in preparing such tests for the industries. The practice sheets were published in final form in the summer of 1926 and have been used in several library schools and apprentice classes.

The trait analysis described in Chapter 13 was prepared by Mrs. H. G. Kenagy with the assistance of the staff.

It will be seen from the foregoing description that the text is to an unusual degree a cooperative enterprise of the craft, so much so that the director feels keenly the justice of expressing unusual appreciation to the American Library Association Head-

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quarters staff, to the Advisory Committee, to the Editorial Committee, to the author, to the members of the staff, to the librarians in over fifty libraries, to teachers and students in library schools, and to many other individuals, in all some two hundred members of the profession, who gave freely and intelligently of their time and experience in the preparation of the text.

W. W. C.

*Chicago*

*June 4, 1927*



## Preface

The student interested in circulation work in the public library has heretofore found in the library school but a small proportion of the hours of study assigned to this subject. He has discovered that the literature is largely out of date and otherwise inadequate. He has observed that theory and practice have not been closely related, since instruction has been planned along general lines and development of routines and methods in libraries has been governed chiefly by local conditions. However, a changing attitude on the part of the library world would seem to indicate a new recognition of the importance and possibilities of circulation work, and to point the way to a new emphasis in instruction.

In the preparation of this textbook, a first approach has been made to the unified problems bearing on the circulation of books. The text has been written primarily for students, some of whom may later become identified with circulation work either in the capacity of assistants or as administrators. For the purpose of giving these prospective librarians a comprehensive view of circulation work, a functional analysis has been attempted. All the activities of a circulation department organized with a broad scope rather than narrow limitations have been described. Related duties and overlapping functions within the department and with other departments have been included where the accent could with justification be placed on circulation work. The library's responsibility to the public, and the responsibility for the assistant's opportunity to develop have been recognized. The work has been built around the idea of effective personal service to the reader based on the assistant's understanding of the importance and significance of this contact.

From this angle the consideration of all the work of the circulation department has assumed a broader and more interesting aspect than could have been foreseen at the outset, even though a

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highly suggestive mass of material had been collected by the American Library Association Curriculum Study. This material has been made available for the use of the writer through an adequate system of tabulation, devised for this purpose by the staff. Thus it has been possible to incorporate in the book a gathering of sound practices existing in excellent libraries and hitherto unrecorded in print. It has not been tied to existing conditions but undertakes to provide for future development and growth. Routine processes surveyed in their broad relations to book service to readers have been regarded as of secondary importance when compared with the spirit of the service given. Emphasis has been consistently placed on:

- (1) An ideal of service through personal contact in the library,
- (2) A constructively critical outlook on processes and routines,
- (3) The possibility of a growing usefulness in the community,
- (4) A professional and personal development through the study of traits.

After much deliberation it has been decided to plan the book around a normal organization of the work of the circulation department, with the hope that this logical arrangement may be suggestive to teachers. The order in which a series of topics is presented varies with the topics, as well as with the instructor's training, point of view, and opinion as to the most useful way of assembling material. In an effort to aid the student to grasp the ultimate objectives of circulation work, it has seemed wise, first, to state them in a general way, and next, to deal with procedures, so that having mastered the necessary routines, he may get the full value of later chapters. However, it is entirely practical for an instructor to place Chapter 13 on the Personality of the Circulation Librarian at an early point in the course with a view to training the students in matters of personality throughout the course, even though the chapter in the text is found second from the end.



## PREFACE

As a further aid in teaching, thought questions have been added to each chapter. As presented, they are a repository from which the teacher may draw, rather than a complete outline of the chapters. The distinction between the use of thought questions and memory questions is immediately evident. Many more are included than will be needed, but the variety may serve as a pattern for others of local application.

A selected list of reading references also follows each chapter. These are in no sense an attempt at a bibliography; they are chosen because of appropriateness for class reading. They may aid in supplying the student with the necessary background and in directing attention to the more recent and interesting phases of circulation work.

As the first book to be written from the material gathered by the Curriculum Study, many matters of policy have had to be considered. These questions have involved such points as the scope of the book; its organization; methods of describing techniques and processes; and the inclusion or exclusion of innumerable variations in practice. All debatable questions worthy of staff conference have been given thoughtful consideration and weighed for usefulness in small, medium-sized, and large libraries. This united attack on problems has greatly assisted the writer in her task.

Appreciation of a more than formal sort is extended to Dr. W. W. Charters, under whose direction this study has been prepared and under whose close supervision and expert advice the work has been done. The writer also wishes to acknowledge particularly her indebtedness to Anita M. Hostetter and Harold F. Brigham, staff librarians of the Curriculum Study, without whose generous and unfaltering aid this book could not have been written. Miss Hostetter and Mr. Brigham have, under Dr. Charters' direction, gathered the material for this study and have tabulated the findings. They have a wide familiarity with circulation work and a thorough sympathy with the writer in her method of ap-

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proach to these problems; this has made staff conferences particularly significant and helpful. They have also edited both the tentative draft and the revised copy of this book prepared for publication, for which the writer wishes to make grateful acknowledgment.

Due acknowledgment is also made to more than one hundred and fifty circulation librarians cooperating in this study. Through interviews involving much time and effort a thorough analysis of circulation work was completed, and such a survey made as has not heretofore been possible. In pursuing the plan adopted by the Curriculum Study for the preparation of its textbooks, a tentative first draft of this book was sent out for critical examination and use in the library schools and to many librarians engaged and interested in circulation work. With characteristic thoroughness and care these teachers, students and librarians returned a mass of constructive criticism which has materially aided in revising this work for publication. To these in particular, and to many other librarians to whom the writer has turned for advice and consultation, her grateful acknowledgment is made for the information and the inspiration contributed.

On behalf of the staff the writer expresses a cordial appreciation of the active cooperation of the University of Chicago and the University libraries.

JENNIE M. FLEXNER

*Chicago*

*June 4, 1927*

CIRCULATION WORK  
IN PUBLIC LIBRARIES



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## CHAPTER 1

# Functions of Circulation Work

- |                                     |                       |
|-------------------------------------|-----------------------|
| I. INTRODUCTION                     | IV. LIBRARY RELATIONS |
| II. THE BOOK                        | V. ROUTINES           |
| III. THE READER                     | VI. THE ASSISTANT     |
| VII. THE FUTURE OF CIRCULATION WORK |                       |
- 

### I. INTRODUCTION

A wide recognition of the range of service to be given through personal contact is changing the conception of circulation work in the library. Its position with relation to the institution as a whole and to the surrounding community is rapidly expanding. As a result, librarians are working through to a broader vision of the significance attaching to this branch of library work. A re-interpretation of traditional ideals is demanded, and an understanding of the spirit that should animate the service designed to spread the influence of books and enlarge the field of library activities. Attention is centering especially on assistants at circulation desks, in whom a new alertness, a new dependability, must be aroused, through careful training and by a consistent emphasis on the service which may be offered.

Library circulation work may be defined as that activity of the library which through personal contact and a system of records supplies the reader with the books wanted. In accordance with this definition, four major functions may be seen to comprise circulation work. In the first place, the staff in the department must of necessity possess a general familiarity with the books which have been provided for the public by the library. In the second place, it is equally important that the assistant should have an intelligent knowledge of the needs and interests of those readers who desire to use the service provided by the institution. In

## CIRCULATION WORK

order that these basic functions be performed, it becomes essential, in the third place, for the circulation staff to know thoroughly the techniques employed in interpreting and carrying out the comprehensive policies of the library as a public institution, and in working efficiently and harmoniously with the other correlated departments of the organization. Not only, however, must the department work in unison with the library as a whole; it has its own particular duty to perform as a fourth function. In other words, effective routines and techniques must be established by the library and mastered by the staff if the distribution of books is to be properly accomplished and the public is to have the fullest use of the resources of the institution. The library must be able to locate books, on the shelves or in circulation; to know who is using material and how the reader can be traced, if he is misusing or unduly withholding the books drawn.

These constitute the four major functions of the circulation department, but in any treatment such as is contemplated in this text great emphasis must be laid also on a fifth factor. The members of the staff must possess those personal qualifications, inclinations, skills, and attitudes which fit them peculiarly for this work if this organization is to operate effectively. A staff so equipped will see the work of this department in its correct relation to all of the work of the library, a unit in a system. Its problems involve broad interests and their solving may enable the library to make a substantial contribution to community life.

For the guidance of beginning students of librarianship, who are for the most part familiar with the circulation department only as readers, a few further words of elaboration on each of these factors may be of value.

## II. THE BOOK

A knowledge of books and of their varied uses is the librarian's chief asset. An increasing familiarity with the library's resources adds constantly to the proficiency of the assistant. This growing

acquaintance must be based on definite investigation planned to include not only individual books but classes of books and general and special collections. Particularly, the strength and weakness of the library's collections need to be examined, since local conditions may in the past have caused the expansion of certain parts of the collection and the neglect of others. A broad interest in everything in print, in books that are read, that are inspected, and even those merely handled in passing, contributes to the sum total of information which is slowly gathered by the beginning librarian. Finally, the constant use of catalogs, the reading of shelves, the keen observation of surroundings, all supplement this fund of knowledge and help to cultivate that confidence which is essential if readers are to be skilfully served.

### III. THE READER

The circulation assistant, whose primary function is to secure for the borrower the book that will please, will need to be a thoughtful student of practical psychology. He should learn to treat each reader as an individual whose request is an important matter. He will cultivate in the reader's mind the thought that personal service from the library to the borrower is the end and aim of the institution and its staff. He must likewise gain a fine skill in breaking through that reticence which is frequently found in the reader when he comes to a library desk. The borrower, as he appears here, is frequently singularly lacking in self-confidence. He may feel that behind the desk is a person who knows the books and the rules to which he must conform in drawing them, and he may hesitate to display ignorance by asking questions. Consequently a large fund of common sense will be found extremely useful at the circulation desk. Many of the difficulties which at first glance seem to the reader to be peculiar to libraries can be easily and successfully settled if they are faced by the staff and the reader in the same way that similar problems are met elsewhere.

Briefly, in making the first acquaintance with the reader, it is necessary to determine at once what he hopes to find. This can be accomplished by skilful questions, which are made as few as possible not only to save time but to inspire in the reader the confidence produced by an intelligent response in the librarian serving him. In meeting the different types of reader who follow each other so rapidly at any circulation desk, the assistant must use not only imagination in questioning, but also a quick readiness and comprehension in perceiving what lies behind the requests. An attempt to dignify the reader's need in his own mind will save many difficult situations.

Not only must the librarian meet individual readers, he must likewise strive to extend the use of the institution to connect with all possible community activities. When such contacts have been made, it is often the circulation assistant who must hold the borrowers by the service rendered. It is wise to draw into the library as readers the influential people of the community, such as city officers and employees, those interested in administering and conducting private schools, social workers, clergy of all denominations, club men and women, including members of boards of trade, chambers of commerce, and luncheon clubs, newspaper people and labor groups. *Leaders of groups* of every sort should be registered borrowers in a live library and should be trained to turn to it by habit for the service it is qualified to give. Every avenue of approach to the library must be kept open.

The field of library activity is not, however, limited to personal contacts. The system, reaching out for potential users who must be introduced to library resources, resorts to all types of *professional publicity*, seeking to appeal to all sorts of people. These may include not only outlying local but rural groups, offering their own special problems, or individuals out of touch with formal education who may find within the library books to broaden intellectual horizons.



## IV. LIBRARY RELATIONS

Since books were originated, some people more fortunate than others have always been able to have them. The primary reason for the existence of the library is its specialized service which makes easily available to the reader a wider variety of books and ideas than he could secure unaided. It is therefore necessary for the assistant to render as complete service as possible through developing ease and efficiency in distribution. This is secured, as has been said, partly through familiarity with the resources of the library and partly through a sensitive understanding of the needs of the public. But this is not sufficient. The assistant must appreciate his position as a unit within the library organization. He must see his work through the ideals of the library as expressed in policies and attitudes, and his own position as one of a group of people who are all striving to carry out the major functions of the institution while contributing expert service in specific positions.

The assistant in any department of a library is a part of a system guided by general policies outlined by a board of trustees. The rules adopted embody the principles controlling all departmental activities. As the necessary familiarity with rules is acquired, the policy of the library with regard to their interpretation is grasped by the assistant. Thus he secures a broadened outlook upon the services which the library seeks to give the community. The wise librarian soon learns that although rules are enforced with impartial fairness, some circumstances call for a literal interpretation while others justify a more liberal attitude. The more fully the member of the staff understands the underlying motives of the institution, the more intelligently can he determine which circumstances call for exceptions to rules.

Not only must the assistant appreciate his relationship to the underlying principles of the library, but he must likewise realize that he is one of a group of individuals who must work in harmony

for the common good. His status must be clearly established. His own specific duties must be clearly understood, particularly those affecting cooperation in the give and take of library work. In making personal adjustments to this service, the circulation assistant will value the importance of loyalty to the ideals of the institution above that to any individual or group. Service to the public is of primary importance, and to it internal relationships must be subordinated.

## V. ROUTINES

In order that the public may have a maximum amount of service from the library, the circulation department must have system for the immediate and complete control of its resources. The ideal situation in a library would be one in which a reader might secure any book that he wanted at any time that he desired to have it. However, it is obvious that this is impossible because the resources of any library are necessarily limited and no library has on its shelves at any one time all the books that it possesses. Many of them are in circulation. Yet it is necessary that the library have control of these circulating books in several ways. It must know where they are, it must lay down rules to see that thoughtless people do not retain the books in their possession unfairly, and it must provide means for securing their prompt return. These and many other considerations combine to make it necessary for the department to install and maintain very efficient methods to control the circulation of books, which are commonly known as routines. Upon the simplicity of these routines, their effectiveness for purposes of control and service to the public, and upon the skilfulness with which they are maintained, the routine proficiency of the department depends.

With the increase of library facilities, the need for new tools and for the remodeling of the old are equally urgent. Records must be capable of expansion and growth, flexible and adaptable,

adequate to protect readers as well as the library. Fortunately, the routine of circulation is steadily growing less cumbersome and difficult. The effective means of saving motions without sacrificing results are being constantly incorporated in library practice. Every effort is being bent toward freeing the circulation assistant from hampering details of routine in order to give him greater opportunity for personal service to readers. The long-sought mechanical device for charging and discharging books, which may do much toward accomplishing this, seems at this moment on the eve of completion. Thus in general ways the methods of circulation grow more effective for both the librarian and the public.

Even the desk where the librarian and reader meet shows the change in the outlook and actual working of this department. It is now without the wickets and barriers of previous generations. It is a post at which service is concentrated rather than a mark beyond which the reader may not advance. To the borrower the desk may suggest a place where an interested assistant can easily be met and where any restrictions imposed will be reasonable and essential.

In order to translate general ideals into skilful practice, the circulation librarian, as will later be more fully explained, will need to be automatically familiar with all the routine procedures of the department. Effective contact may depend on ability to do accustomed things with the hands while the mind is free to attend to the problem presented by the reader. This familiarity should, however, stop short of being mechanical. The *purposes behind* the successful performance of small, essential, daily duties at the circulation desk must be understood in order to give meaning to routine.

## VI. THE ASSISTANT

The assistant has to perform the four foregoing functions to master the resources of the library, to help the public, to work

intelligently as a member of the library staff, and to care skilfully for routines. But no institution is more effective than the people who belong to it. The success of every organization is dependent upon its individual staff members. It is therefore necessary in this task of understanding people and serving them that the assistant exercise the highest intelligence and that he pay consistent attention to his own personal talents. With a view to aiding himself in gauging his personal traits, and their usefulness, the student is referred to Chapter 13 of this book. There suggestions are made to be followed in measuring endowments and developing weak points, by those engaged in serving the public.

By accident or neglect the circulation department has in the past often been sacrificed to other major departments whose demands have seemed to be more insistent. The importance of training and special qualifications for the circulation librarian, when compared with the requirements of other more technical departments, have not always been fairly measured. Catalogers must have certain definite traits and training, reference librarians need their own special capacities and education, but the requisites for success in the circulation department are equally complex, perhaps more so because they are not easily classified nor always immediately obvious.

Under the old order the assistants at the circulation desk in many libraries have been those members of the staff with useful traits but no very definite gifts, those who wanted to do library work and were given their probation at the charging desk. Many students of limited talents completing courses in training classes have often been assigned to the circulation department, to remain there, deadened by routine and untouched by the opportunities for public service which have not been made clear to them. The development and improvement of circulation systems in libraries have demonstrated the inadequacy of this type of assistant. With

the changing conception of the strategic importance of the circulation librarian in his contacts with the public must come a new attitude toward the department. It should now be recognized that the circulation librarian has probably a wider influence upon the service of the public than has any other member of the staff. In a sense all other departments exist for the public departments, the function of which is to bring together for the use of the public the finest possible collection of materials for distribution.

The responsibilities of the circulation librarian increase as his service is enlarged. This means specifically that he must pay close attention to the traits of personality which are found to be necessary for those who perform such services. In addition to this he must have more than a routine familiarity with the books of the library. He must himself be a lover of books and reading. Finally, he must seize all possible opportunities for self-improvement in ways that only indirectly contribute to his proficiency.

Each staff member makes his own contribution, depending on background, endowment, training, and, most of all, on an *interest in readers* and the *will to serve*. The more competent the assistant, the better he will be able to interpret the library and its desire to supply that guidance and aid without which the information sought might not be discovered by the seeker.

## VII. THE FUTURE OF CIRCULATION WORK

Routine methods used in public libraries today have developed from simple beginnings. From old attitudes toward the activities of circulation work has come a new realization, rich in promise for the future. Great progress has been made in the improvement of processes for facilitating the use of books, but nothing final nor perfect has yet been achieved. The variations found for every detail of circulation procedure, the widespread lack of

uniformity in method, have seriously interfered with the teaching of circulation work.

The evolutionary process with regard to circulation work may be regarded as still in its early stages. The development of methods has been largely the result of local conditions. When the system installed at the organization of a library has proved inadequate, adaptations and reorganization have been made, frequently without regard to practice in other libraries. But increasingly active-minded librarians have treated the circulation problems as a subject that repays careful research. It is to be hoped that, as greater attention is paid to these problems through central research organizations or through study in individual libraries, still simpler systems can be devised. From the experience of this generation should come improvement in technique which will enable the library to reach a greater proportion of the population of any community in ways not yet visualized.

The future of circulation work cannot be regarded, however, as being entirely dependent on improvement in routines. For the student interested in human reactions and in the possibilities for extending service, great incentives are to be found in work at the circulation desk and a study of its problems. Development and progress in service to the public through this department may be expected from librarians who are interested in the spread of ideas through books, and who undertake careful analyses of community needs and library possibilities. Facilities for meeting these needs and for creating new and more productive contacts between libraries and communities call for the most careful study. Such research should be carried forward in the manner of any scientific investigation, and since all experiments are primarily for the benefit of readers and secondarily for the benefit of librarians desiring to serve them, the objects to be sought in such investigations should look to the further linking of books and people rather than to the accumulation of mere statistics.

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*Note:* The following references apply to circulation work as a whole and not to a particular chapter. They are added to aid the student in making a more extensive study of the subject.

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### THOUGHT QUESTIONS

1. What are the purposes of the circulation department of a public library?
2. Discuss in a general way the relation of a circulation assistant (1) to the library, and (2) to the community.
3. What relation should exist between routine and service? How can the assistant cultivate the proper attitude toward routine?
4. Summarize the changes affecting the staff and routine which have come in the development of circulation work. In what ways are these changes significant of future development?



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## CHAPTER 2

### Contact with the Public

- |  |                                       |
|--|---------------------------------------|
| I. OBJECTIVES                              | III. CONTACT AT CIRCULATION           |
| 1. Personal endowment                      | DESK                                  |
| 2. Routine and rules                       | 1. Self-appraisal                     |
| 3. Acquaintance with books                 | 2. Approach                           |
| 4. Point of view of the library as a whole | 3. Estimate of reader                 |
|  | 4. Determining readers' needs         |
|  | 5. Meeting needs                      |
|  | 6. Helping the reader to help himself |
| II. ATTITUDES                              |                                       |
|  | IV. OUTSIDE RELATIONS                 |
|  | V. COMPENSATIONS                      |
- 

A circulation system comprises two main factors, the routines and the personnel. The preceding chapter has emphasized the fact that the staff vitalizes and makes useful to the public all the routine processes involved in lending books. It is, therefore, to the point that students of circulation work appreciate early all that is involved in the successful contact between the reader and the library.

#### I. OBJECTIVES

The public estimate of the value and usefulness of the library is almost always the result of numerous personal contacts between individual readers on the one hand and members of the library staff on the other. Thus the whole system may be judged by the work of a single assistant. The crucial first contact has much to do with the reader's future use of the institution and, therefore, the circulation assistant, while conforming to the regula-

tions set for the staff in meeting the public, will also direct intelligent effort toward harmonizing routine with a broad ideal of service.

The reader who goes into a modern public library has some idea of what he hopes to find, not only in books but in service. The ideal in his mind may have been built by experience, a composite image slowly constructed at many circulation desks. Or he may be a stranger to library ways, whose impressions are yet to be formed.

The continuous effort of every librarian at a circulation desk is to gain a better acquaintance with readers and books. The assistant meeting readers must estimate the character, ability, and need of each person presenting himself. But he must also accept the fact that at the same time this effort has its counterpart in the mind of every reader who is watching his reactions to the task of the moment. Success or failure may involve more than answering a question or finding a book. Here is a situation to keep an interested assistant on his mettle, to inspire him and to lend a permanent impetus to the work.

### **1. Personal endowment**

The assistant whose interest in people as well as books marks him for circulation work should realize from the first that he is part of an educational system with a reach wider than that of schools or colleges. Unless the imagination is stirred by the scope and the variety of problems met, the mere drudgery of the routine connected with the circulation of books may discourage even those beginners possessing the possibility of useful development. Every bookish taste and instinct, acquired or innate, adds to the usefulness of the circulation librarian supplying the book needs of the public.

A proper amount of self-confidence and assurance is essential in approaching a reader. The new member of the circulation

staff, seeking to become a useful person, may be helped at the beginning if a picture of the duties and personal equipment, and the opportunities of the work as related to each other, are kept clearly in mind. A sort of mental stock-taking may revalue those qualities with which he is naturally endowed, and that training and knowledge which have been acquired, and may stimulate a systematic effort to reduce newly recognized limitations. This new assistant is often handicapped by a dread of the unknown demand which may come from the reader. The staff member who early realizes that within himself are hitherto unsuspected resources and that all sorts of aids lie close at hand will develop rapidly that poise which is a primary requisite in successful personal relations. It is a matter of interest and surprise, even for the experienced person, to see how frequently casual reading or incidental information supplies the clue for a puzzling request. Everything the librarian has done and seen and read, every association, every social and mental quality will at some time stand him in good stead.

Certain basic qualities should characterize every assistant meeting the public, whatever the differences of mind, background and training to be found among members of the circulation staff. There must be a feeling for books, preferably a personal gift, an urge which goes beyond the use of books with readers, an untiring interest which, in spite of pressure of work and lack of leisure, keeps secure the joy that comes from reading. A feeling for people, based on genuine liking, may be linked with a sympathetic appreciation and understanding of human nature, and an enthusiasm for all sorts and conditions of men. This interest must be a personal concern, not detached. It should spur the librarian on to ingenious ways of meeting difficult situations. The librarian who is approachable can put the diffident borrower at his ease, and may find himself the recipient of unexpected personal confidences which help to make the way clearer. The borrower will perceive this attitude if a quick willingness to meet demands

and a poise implying the necessary background and knowledge are evident.<sup>1</sup>

## 2. Routine and rules

Thorough familiarity with desk routine is indispensable. The staff member must know that all the routine in any circulation department is devised and performed in the attempt to make smooth the relationship between the borrower and the library, and to protect the latter against loss. The machinery of the circulation desk requires constant attention if its operation is to be perfected, if time and effort are to be saved for the reader and the staff, and if the reader is to obtain what he wants in a form suited to his purpose, and in a manner that invites a repetition of requests. Facility in routine work must not be allowed to develop in the staff member an institutional or mechanical attitude toward the public. No assistant should be an automaton, interpreting a code strictly but unintelligently. Rather should he display a keen desire to give the reader what is wanted, though in fairness to all readers he must stay within the limits laid down by rules.

## 3. Acquaintance with books

To the active assistant at a busy circulation desk, books stand for two things: a vocation and an avocation as well. These two uses must, for the librarian's own sake, be kept separate in some respects and correlated in others. The librarian must not pursue primarily his personal interests, except in leisure hours, but as a book-lover he may find from resources of his own the means for supplying special information when tools and aids fall short.

The really able worker, equipped to get as well as to give all the satisfactions of successful service, should be a reader. With this in mind, administrators generally make all possible arrangements to supply the staff with books and reviews which add to

<sup>1</sup>See Chapter 13. Personality of the circulation assistant.

their professional equipment. The danger here lies in unwisely substituting reviews and comments about books for opinions based on personal reading. Though such reviews must be read, it is to be hoped that the ease with which the assistant utilizes review estimates, skims new volumes, and comments on them will not destroy the capacity to read thoroughly and carefully.<sup>1</sup>

In an effort to overcome inexperience and insufficient acquaintance with books, the new staff member should acquire as rapidly and systematically as possible, a knowledge of the *local book collection*. One of the best ways to accomplish this is to utilize every free moment for inspection of the shelves. In passing even familiar shelves, books may be noted with the mind as well as the eye; a brand new book appears on a shelf usually uniformly drab, and presently a borrower may be found for it. A volume obviously out of place is recognized and removed at once. Shelves can be read, that is, inspected for proper arrangement, with real advantage as a means of gaining familiarity with the authors and titles of the books handled.

Preliminary instruction should acquaint the circulation assistant with the *special collections* which supplement the general resources of the system. In addition to the usual separate groups of art and music, the library may possess carefully assembled collections of local history, or the works of local authors, or other subjects of particular local interest. In most libraries will be found old and interesting, and perhaps valuable books and material which may not be often used. An acquaintance with the scope of these collections and the purpose behind their accumulation is an advantage to the assistant who may not only draw upon them on occasion, but may win the interest of readers who may help in developing them. A call may come for some rare book or set, or an opportunity to prove that the library values many books for historical or sentimental, as well as for practical reasons.

<sup>1</sup>See Chapter 14. The assistant and his reading.

The assistant with an interest in books instinctively finds his way to them and among them. But the whole matter cannot be left to the inclination and taste of the individual. Members of the circulation staff must know the new books added and to be added. Personal ingenuity may guide the assistant in securing this information, but he is also entitled to any direction which may help to create a real liking for books.

In many libraries, books under consideration for purchase are distributed to staff members for reading and evaluation. A double advantage comes from this use of new books. First, help may be given the selection agency of the library if the assistant is required to submit an original critical estimate of the book. Then the assistant has the further advantage of having read new books and of being able to discuss them. A sense of responsibility and purpose may develop rapidly with the capacity to weigh literary and artistic worth against other types of appeal.

A more or less careful inspection of books added to the library is generally required of the staff. Books may be held for examination for a short time in the catalog or other departments. Or, when held for public examination, the staff may be required to inspect them. This skimming survey should be as thorough as time permits. A glance at the title page will give publisher and date, as well as author and title. The call number will associate the volume with other related books. The table of contents may be enlightening and the index is always vital in the quick mastery of a book. Illustrations, maps, pictures of men and things, new material dealing with old or new subjects, everything that an alert mind and a quick eye can with practice learn to catch in merely running through a book, may prove of use.

In many libraries books in process of preparation for public use are lent for short periods to members of the staff. Every responsible member of the staff will consider this a special privilege and will recognize the disadvantages to the public if new titles are unduly delayed in passage. Out of this situation has grown in

some libraries an effective practice which has possibilities of development elsewhere. A small *staff collection* is assembled, consisting of duplicate new books in popular demand. The books are regularly circulated to staff members until this demand for them ceases, when they are transferred to the general collection. This practice is fair to all concerned and encourages the staff to read new and worth while books by making them easily accessible.

Staff meetings or group meetings often include discussions of new books, a procedure yielding obvious returns. Another common practice suggests that *weekly lists of new books* be easily accessible for both staff and public use. Borrowers may form a habit of inspecting them and leaving reserves for titles. Assistants find in them a source of suggestions, not only of titles for reading but of topics for discussion by groups and clubs. Temporary notes of books ordered but not yet received may be available for inspection by the staff or similar lists of books received but not ready for circulation. Whatever the means pursued, the circulation assistant will feel the obligation to be reasonably conversant with the library's acquisitions.

#### 4. Point of view of the library as a whole

The ambitious member of the circulation staff will comprehend fully the importance of acquiring an adequate idea of the complete resources and services of the library, its organization and his own place in that organization. The library is responsible first to those who come to it for help. Beyond this obligation to the individual lies a further responsibility, not to be disregarded, to the whole community which is the library's potential field of service. All effort is bent toward making the library so vital a part of educational activities that it is taken for granted, looked to, and called on to participate in any contribution intended to extend the horizons of those who can be reached through books.

The circulation department, in common with other branches of the service having direct relations with readers, must express

in the performance of its regular duties the actuating motives behind the whole institution. The work done by departments out of touch with the public is essential, and it must be justified by the service rendered through aids which they provide to those meeting the daily call for assistance. The librarian at the public desk occupies a strategic position in relation to both the staff and the public. The reader seldom realizes what work and skill have been necessary to prepare the book supplied him with apparent ease. But the circulation assistant should hold a very definite picture of all that has been involved in this preparation of the books themselves and of the records which increase their usefulness. Though the collection is divided into departments and sections, the unity of purpose must be accepted. A survey of other departments of the library and an understanding of their purposes and organization are requisite if the assistant who stands between the public and the books is fully equipped to interpret the whole library to readers through service.

## II. ATTITUDES

A staff member and a reader are involved in any contact between the public and the library and on the attitude of the library assistant may depend the whole success of the encounter. Knowing this and thinking of the work with a vision of its possibilities and a clear idea of the service to be rendered, the assistant will have definitely in mind a goal toward which to aim. Achieving this goal involves a proper attitude: (1) of the assistant to the borrower; (2) of the assistant to his work; and (3) of the borrower to the library.

### 1. Assistant to borrower

The assistant who happens to be a cheerful, vivid, resolute person with imagination and a certain instinct for leadership, is likely to cultivate quickly a manner which is properly personal. Thus



may be shown a genuine interest in the reader's library needs, which in no way implies an intrusive or prying interest in his other affairs. The confidence of the borrower can be won early in the transaction through an easy, pleasant manner which suggests, by a proper assurance, the resourcefulness of the staff member. The latter's attitude is never superior nor patronizing, but receptive. His ability to use the library and its tools must often be supplemented by the information which the borrower, under proper encouragement, will put at his disposal. Quick judgment can determine promptly whether the reader should be helped to help himself or whether he needs more than mere guidance.

Each meeting with a reader, whether it comes early or late in the assistant's day, calls for freshness and unflagging interest with no hint of hurry because of the pressure of uncompleted work or of other borrowers waiting to be served. Such service often calls for real power of concentration and a certain swift precision which experience helps to develop. Though no haste is suggested, every effort will be centered on supplying what is asked for without undue expenditure of time.

The assistant's first success in handling the public may depend upon the manner of approach. Simplicity will be the keynote in addressing the timid person not quite sure of himself. An utterly impersonal air will do much to convince the over-friendly that the service is distinctly an official one. But withal the assistant needs to be versatile and human, to understand that some borrowers will appreciate every effort and will respond cordially. On the other hand, readers who seem crabbed and unwilling to be pleased give an opportunity to test skill in handling people and to exercise ingenuity. An unfriendly borrower won and convinced of the usefulness of the library is likely to become a staunch supporter. The librarian who shows a broad interest in all readers thereby finds himself growing increasingly familiar with many activities in the outside world.

A willingness to do little friendly things to oblige or save a borrower trouble will demonstrate a cooperative spirit. For example, there are the readers who telephone the assistant at home, perhaps on Sunday, and ask a favor involving time not scheduled at the library. If this call represents an emergency, a service out of all proportion to the effort may be rendered by meeting the request. But it is well not to accommodate the same borrowers too often, or too regularly, for presently the assistant may be in the uncomfortable position of granting special privileges unofficially. The small courteous act performed in passing, in the library or out, is one thing, but the favor involving the readjustment of rules must be immediately recognized as another, and should, where it is possible, be handled in the customary way.

Courtesy and civility should be the rule of every desk. A thoughtful assistant would certainly feel that a word of explanation was due if a borrower had unavoidably been kept waiting for an unusual length of time. In case of possible error and misunderstanding the librarian will never pit fallible records against the declared word of a borrower. This is particularly important if the borrower has not already given the library definite cause to doubt his word. The assistant who means to succeed will never be curt or sarcastic in word or tone, nor will he be tired or bored, nor unduly amused at borrowers. To laugh with a reader in kindness is one thing; to laugh at him so that he is conscious of ridicule is inexcusable.

And here a word of caution about the telling of amusing library stories may not be amiss. The assistant who is known by his friends to indulge in this dangerous diversion injures his own standing. The confidences given on duty, and the human shortcomings discovered are professional secrets and should not be lightly discussed nor divulged. The librarian soon destroys much of his usefulness if a quick tongue, a sharp sense of humor untempered by kindness and sympathy lead him into personal narratives concerned with the day's work.

## 2. Assistant to his work

The assistant in circulation work will look upon the mass of routines as the medium of service which can be made successful only through proper attitudes. He must approach this work with a dauntless spirit of enthusiasm, with an interest in processes subordinated to that in readers. This interest should be intelligently critical, both as to details of methods and as to the spirit and manner of performance. Staff members regarding their work professionally will be fair both to the library and the public.<sup>1</sup> They should avoid unnecessary conversation and the appearance of visiting at desks, as well as irrelevant discussion of outside matters while performing routine services for readers. Even when changing schedules and leaving unfinished work with others, they must avoid congregating in groups, and standing with their backs toward borrowers, although engaged in perfectly legitimate conversation. The borrower should never think that he is interrupting; hence pick-up work must be dropped at his approach. Nor must there be any question or misunderstanding as to whose turn it is to serve the reader, and each assistant must take a share of difficult borrowers.

## 3. Borrower to the library

The second element involved in establishing satisfactory contacts at the library is the borrower. Just as assistants of many sorts are to be found on one side of any circulation desk, so on the

<sup>1</sup>"The peculiar characteristics of a profession as distinguished from other occupations, I take to be these:

"First, a profession is an occupation for which the necessary preliminary training is intellectual in character, involving knowledge and to some extent learning, as distinguished from mere skill;

"Second, it is an occupation which is pursued largely for others and not merely for one's self;

"Third, it is an occupation in which the amount of financial returns is not the accepted measure of success."—Louis D. Brandeis, Justice of U. S. Supreme Court.

other side are readers of every degree of culture, every variety of background, voicing needs which the assistant must receive and classify and handle fairly and tactfully.

If a shrewd observer wishes to discover the position occupied by the library in any community, let him stay for a period at the circulation desk. There he can estimate with reasonable accuracy the use and usefulness of the institution and the regard in which it is held, merely by watching the attitude of borrowers as they come and go. The appreciation of the community will be revealed broadly in its use and its support. If the importance of this fact is realized by the assistant, he will strive to create through service a friendly, satisfied attitude on the part of the public. This may be a slow process since only a part of any community comes to the library. In dealing with these readers who come it may be possible to win the friendship and cooperation of the users who feel at home in the library and know what it offers. But even among the registered borrowers of every library are many who know little or nothing of its scope, its aims, or its possibilities of development. Here is a responsive group whose attitude may be wholly changed under the proper tutelage.

Beyond the registered borrowers there are others whose attitude to the library must be established—those who fail to recognize its existence and lack all knowledge of its functions. These potential users may be indifferent because of ignorance or because of failure to understand the library's willingness and ability to serve. Through reaching and satisfying the borrower it may be possible to extend the library service to many others. From these same satisfied borrowers often come invitations to participate in civic activities where further contacts may be made and library service presented.

The assistant receiving a reader's request has no way of estimating at once its relative importance. His duty is to direct his best effort toward comprehending what each borrower wants and to get it if the material is in the library. The mere understanding

of the request is not always easy. People are strangely reluctant to state frankly what they are seeking and frequently make demands in general, sweeping terms which must be skilfully sifted to disclose the specific thing required.

#### 4. Types of readers

Among the people who follow each other closely at a busy desk will be first and always that large group of friendly borrowers, polite, grateful, anxious to give as little trouble as possible, and appreciative of the service. These readers slip by causing no unnecessary delays because they seem to understand that certain limitations exist in any public service, and further, that the assistants are but human and may perhaps make mistakes, in spite of care. With more or less decisive borrowers, who by the form of their request show a knowledge of libraries and how to use them, the assistant listens carefully and may find himself able to supply demands with but little effort.

In addition to these readers who respond at once to an intelligent professional interest, there are the unfriendly ones who are not to be won and who often grow more truculent if they suspect an effort to make the transaction less thorny. There are also the opinionated borrowers who feel sure that they know more than the library assistant will ever know. They cannot be openly shown their mistakes though they must often be surreptitiously led from the error of their ways. The undecided borrower presents other difficulties. He is often satisfied only when the librarian can be persuaded to make the final choice of books, which choice should always be made by the reader. In each of these cases calm, consistent firmness and decision usually indicate the only way out of the difficult situation.

Again, there is the indolent borrower who wishes to be spared all mental as well as physical effort. He often insists on a particularly tireless sort of service calling for much patience on the part of the assistant. The bored borrowers come to the library

sure that they cannot get what they want, even when they have no very definite idea as to what it is. They can sometimes be surprised into complete friendliness if given the choice of a few books in new covers, with provocative comments on their contents. Much understanding is needed to win over the uncommunicative reader, and the talkative reader calls for a good listener, with a capacity to limit the conversation to the matter in hand. There are also the borrowers who take out and return large numbers of books but who repeatedly cause confusion at the desks by never returning at one time all the books and the readers' cards needed to complete the discharge. As these people follow each other day by day, the assistant learns their peculiarities, interprets these attitudes, discovers means of avoiding some of the difficulties encountered by inexperience, and finds ways through his choice of books to secure for the library the friendly interest of the readers.

### III. CONTACT AT CIRCULATION DESK

Assuming that the assistant has the correct attitude toward the situations which arise at any circulation desk, he is prepared to carry through the procedure of actual contact. The initial phase of any contact is largely subjective and will ordinarily comprise three mental operations in rapid succession, namely: (1) self-appraisal; (2) approach; (3) estimate of the reader.

#### 1. Self-appraisal

The assistant about to meet a borrower faces his work with full knowledge of what he brings to the situation. If he is honest he recognizes his limitations but he will never jeopardize an opportunity to serve by advertising them either to the public or to associates. He sets himself firmly to overcome what can be overcome and to forget minor limitations.

There will be difficulties in the beginning in adapting theories

to practice, but experience will smooth the way and nothing is more stimulating than to discover within one's own equipment the means of meeting the demands of the day's work. A little success with a few readers, and the developing process begins and goes forward. Progress may not go by leaps and bounds. Discouragement comes even to experienced workers. Though a librarian handles books daily, he never knows enough of them, and his knowledge of the collection can be vividly supplemented if, in addition to other efforts, he gives careful attention to the comments of the men and women who read and think about books. Time and the test of work will place the proper estimate on personal knowledge and help the librarian to achieve the necessary personal balance. No limitation will be accepted as final.

## **2. Approach**

In casting about for suggestive methods of establishing right relations between the reader and the assistant, librarians find much to be learned from the principles of salesmanship. Although essentially commercial in character, these principles can be successfully converted to the librarian's uses, if necessary distinctions are clearly borne in mind. The development of a technique has been necessary in business transactions involving the sale of things needed to supply physical wants. The same studied effort is required of the library assistant who has to meet intangible demands, in helping those who reach toward visionary goals, driven by a hunger that is very real and insistent. The assistant will want to know all possible commercial methods but the use of this technique will be an adapted one. His attitude will be professional. His interpretation of service may be more subtle. His experience will point the way to employ what others have found useful. His vision of his calling will spur him forward in his effort to perform a genuinely significant service.<sup>1</sup>

<sup>1</sup>See Thought Question No. 13.

### 3. Estimate of reader

The monotony of the day's work at a circulation desk fades and the whole routine procedure becomes alive when the interested circulation assistant has an opportunity to weigh, judge and estimate the reader's needs as he presents them. Very early in service with the public, the librarian will see the wisdom of not judging the borrower too quickly by his appearance, by his manner, or by incomplete information. A much more accurate conclusion may be drawn if one listens to what the borrower says and how he says it. The first real clue to a borrower's interests can often be obtained when he is registering. The locality in which a man lives, and the work that he does are significant things to the library assistant acquainted with local affairs. Further, a reader's whole method of approach cries aloud the facts about him. If it is the custom to devote a few minutes to showing the new borrower about, his interests can often be deftly drawn out, and he can be directed to the best sources of information. When a reader returns books, a glance at those he has had and another glance at his face often enable an assistant to dispense with many questions which would otherwise be necessary. But to judge what a reader wants next by what he has had last may lead to pitfalls, for he may return books which he has not read. Hence too much cannot be taken for granted. In any public position the assistant able to associate names and faces has an advantage worthy of cultivation, far-reaching in its possibilities. If this assistant has cultivated an associative memory for tastes and faces and recalls the borrower's declared preferences for certain books or types of reading, he has a real asset which can be trained to increasing usefulness. The borrower who cannot find a definite title may later be met by the assistant with the book or with some word about it. *Any service which conveys to the reader the idea that his tastes and desires are of sufficient importance to be remembered is worth pursuing.* Certain tastes may be associated with a borrower, because he asks for the unusual book, or class of books, because he has some striking



trick of manner, or personal trait, because he is noticeably disappointed at not finding what he wants, or because the assistant has to make an unusual effort to supply the demand.

Unless the assistant knows the borrower and something of his interests, the whole estimate must be based on powers of observation and skill in inducing him to state his wants. A preliminary estimate may sometimes be confirmed while the reader is otherwise occupied, or after his departure. Thus if his request suggests that further information about him would lead to better service, the registration file, or the city directory, may be speedily consulted. In some libraries, the staff has access to an informal file of borrowers, noting occupations, business or professional interests, church and club affiliations, and the particular books or types of books which interest them most. Even a casual record of this type will prove a useful tool for the beginner in the circulation department.

#### **4. Determining readers' needs**

The urge that sends people to the library is as varied as the people themselves and in many cases the actuating motive behind the request is wholly obscure. The assistant cannot always determine at once just what the reader hopes to find. Is he a borrower wishing to browse, to read for recreation, or to read with some set purpose? Is he a student in school or university with assigned duties and outlines to meet? What are his interests, his hobbies? What can be found to attract this reader and through interest draw him back again? He may be young or old, a professional man or a laborer. Or, the borrower may be a club-woman with a special piece of work to do, indulging in an annual spurt of intellectual activity which calls for much mental agility on the part of the assistant. Almost each individual who comes asks for a different thing. The assistant receiving these constantly changing demands, accepting the challenge of his position between book and reader, soon distinguishes the various types of re-

quests and knows something of what is expected. The reader who knows what he wants, and has come for it voluntarily, may ask for more or less definite help to obtain specific books or material. If the assistant does not at once grasp what is wanted, he must question the borrower with all the skill he can muster. There is in addition that large group of readers vaguely desiring things that seem out of reach. In this relation, the assistant has an opportunity to create the very desire he satisfies; to try to formulate that which is scattered; to help the reader focus his mind's eye more definitely upon the object of his search. Furthermore, by inspiring confidence in himself, the librarian often helps the reader to a clearer, franker statement than at first seems possible.

(a) *Definite requests.* The reader with a definite request comes at once to a desk. Here he asks for the book or information that he wants. If the books or material are to be found in the circulation department, the assistant will judge whether or not he should have help in the use of library tools and catalogs available to the public. If that type of guidance does not seem appropriate, the catalog must be consulted by a staff member who will obtain on a call slip the information necessary to trace each book. This usually consists of full call number, brief author and title. He will then search for the books listed, or send a page for them. The fallibility of a page must not be overlooked, however. If the assistant suspects that an error has been made when a book is reported out, he is justified in verifying the search. But this must be done quietly to avoid destroying the borrower's faith in the thoroughness of the search or in the searcher. In some libraries the borrower himself, armed with the call slip, may be conducted to the books on the shelves. This may offer the advantage of permitting the borrower to make the first move in the game of substitution of one book for another which the circulation assistant plays with fluctuating success every day of his life.

In large or medium-sized libraries many readers, unfamiliar with the divisions of the system and their scope, bring to the

circulation desk requests that must be directed elsewhere. The assistant knowing where the borrower's question should be answered can follow the obvious course and give simple verbal instructions. But if a borrower seems confused by being sent elsewhere, it is wise to introduce him to the person who will serve him, or to send with him a statement of the search that has been made in order to prevent duplication of effort. Sending a borrower from post to post without due explanation often discourages him seriously. Wherever it is possible, without too great infringement of rules and schedules, an assistant will see a borrower through a whole transaction.

(b) *Indefinite requests.* In addition to the clearly stated requests, every assistant receives frequently many very difficult calls for help. The indefinite borrower, previously described, often makes a circuitous request, supplying only hidden clues from which the assistant may proceed. To meet these needs, skill in questioning, as outlined below, must be combined with shrewd estimates of readers.

(c) *Created requests.* Many potential readers make no requests, but if properly approached when in the library, they will respond quickly. The staff, particularly the assistants working on the floor, frequently have the opportunity to create a desire for books by displaying them attractively, discussing them interestingly, and suggesting them skilfully.

With two general types of borrowers this creative type of suggestion may be effectively employed. First, there is the borrower whom the assistant approaches because he will not come even halfway. And second, there is the general reader who seeks suggestion, guidance, aid in selection, as well as discussion of books in particular and in general. Each successful assistant has an individual talent for securing information from readers and many such methods can be adapted and evolved for staff use in any library.

(d) *Skill in questioning.* The questioning of readers to ascertain their specific needs involves a special technique which will tax the assistant's utmost skill and resourcefulness. Early in the experience of meeting the public, the librarian will wish to think through to the reasons behind the questions he asks the borrower. These queries can be so formulated that the answers disclose more than the borrower suspects. Each question must be definitely related to the topic in hand; one question should follow another deliberately. Too many questions must not be asked. The borrower must not be confused by the speed or the appearance of superior knowledge shown by the assistant. He should not be committed at the outset to any book or type of books, but must be allowed perfect freedom to change his mind and his choice. Let the books offer their own temptation.

When a borrower makes a voluntary request the contact is farther advanced than when the assistant is compelled to create the opening, and his first statement often suggests the course to be followed. Whether the borrower talks of his own volition or must be led to express himself, the assistant in estimating him, his needs and interests, listens carefully to all that he says, to his tone and manner of expression, and watches his actions and reactions closely. From this composite impression will be evolved an idea as to how to proceed to meet his needs.

When the less fluent borrower makes the approach, the assistant may find it necessary to supplement the first statement with questions. Does the borrower want definite books or will any good books dealing with his subject answer? The assistant must find out, without bald questions, whether the borrower is reading as an interested general reader or from the angle of the student, or whether he wants an elementary or advanced treatment. The librarian must never condescend to the reader nor by his manner allow him to feel that the book which suits his tastes, needs, and ability is poor, or cheap, or unworthy. The actual importance to the individual of the book desired is not always obvious, and the

effect of adverse criticism of the author or title, or even an ill-timed suggestion of something better, may prove harmful. If all questions can be put in such a way that the reader can answer them with yes or no, even the hazy borrower with undefined wants may be assisted to a decision. The power of suggestion through skilful questioning can be most interestingly and successfully developed, if the assistant knows where to stop. Under the influence of a pleasant manner and an enthusiastic appreciation of the topic under discussion, an artificial interest in certain books may be aroused which, when separated from the stimulus creating it, is likely to subside. The reader then finds himself with a collection of books which the assistant wanted him to read, but which may in no way satisfy his purpose. This leaves the borrower displeased and he may in the future be skeptical about suggestions because he has been unduly influenced, though quite unintentionally.

Much of the work of discovering the interests and needs of borrowers can be accomplished away from desks, that is, by an assistant assigned for *work on the floor*. Especially in open shelf libraries, questions are often asked the staff member who is placed conspicuously, so that the borrower who hesitates to approach a desk will find someone near to help him. Perhaps he will make the request because the assistant is not occupied at the moment, or because he has overheard a comment to another borrower. If the reader does not approach, this assistant may offer his services directly, or may give him a book for inspection. If the book strikes the right note, the reader may ask for others; if it does not appeal he has the opportunity to state his preferences. It is well for the assistant to learn early the wisdom of avoiding the final decision on definite books for a borrower to read. In the first place, the borrower's power of choice and selection should be cultivated. In the second place, no two people have the same taste in books nor the same reasons for liking them, and the assistant has no means of knowing the real urge behind the choice. If two or three titles

of the desired type are given the borrower with a word about each, he may take any or all or none of them. The tactful assistant will make it possible for the reader to leave the book which makes no particular appeal, without this seeming to reflect on his judgment and taste. Furthermore, the assistant who strikes the right note with the reader is likely to be sought out for a repetition of the service. When a borrower, with a vivid remembrance of the details of the last encounter, appeals for "something else just like the last book," the assistant will not wish to say that he recalls neither the borrower nor his tastes, nor to repeat the questions previously asked. But if he can remind the borrower that he made a selection from two or three titles and inquire which one was finally taken, the needed clue is supplied.

The borrower, by instinct and cultivation a *general reader*, who comes to the library with an open mind and a constructive interest in men and affairs as reflected in books, offers the assistant stimulating and compensating opportunities. This reader may prefer to browse and to make his own selection largely from the shelves, handling and turning over the books themselves. But he is seldom proof against a well-timed remark about a new book or an old one of newly discovered interest, or a current happening reflected in some title available presently if not at the moment. His crisp comments on books will often prove useful in bringing other borrowers to mind as readers of the same titles. By a query dropped in passing about "the books you had last time," the assistant may find many hints for increasing usefulness in dealing with others by enlarging his acquaintance with borrowers and their tastes.

The *discussion of books with borrowers* may be an endless source of inspiration. One interest suggests another and the borrower may be led from fiction to biography or travel, or to other fields. An armful of books containing even a sprinkling of the bright, attractive covers in which most books start out, requires only a few short provocative comments, and the borrower will

follow the suggested trail and take the books which tempt him. The person who shows an interest in the make-up of volumes may be won by having his attention called to books which are handsomely bound or illustrated, or beautifully made or printed. The reader's manner of responding to suggestion, his way of handling a book, the things he looks at and looks for, all indicate the direction of his tastes and the best opening for service to him.

Among the people who come to any public library, none call for more sympathy and skilful handling than *the foreigner* struggling to reduce the handicap of language limitation. In communities where many foreigners live, the library collections frequently contain books in the languages represented in the population. In addition there are usually elementary English readers often planned for adult use. These usually contain bi-lingual vocabularies which may be pointed out by the assistant when he can do little more than guess at the wants of the beginner in English. As the foreigner progresses he may be led to help himself by having his attention drawn to books listed by librarians who have worked with this problem. If the borrower is familiar with the classics of his own tongue, he may be interested in the English translations of those classics as a means of increasing his vocabulary. The librarian has a social responsibility to the community in relation to this borrower and should try, through books, to give him an understanding of the new conditions in which he finds himself.

## 5. Meeting needs

To complete any successful contact between the reader and the assistant, the books wanted must be supplied or a satisfactory equivalent substituted if possible. This process may have involved the mere routine of supplying books or material from the shelves. Or it may have represented a service following up and utilizing all the information about the borrower which the assistant has been able to gather. In either case, in large libraries or small, the demands on the collection often exhaust the copies of certain books

and bring into play the assistant's skill in substituting the book that is available for the one that has been called for. In making substitutions, the assistant must first of all be perfectly honest and aboveboard with the borrower and must be sure that the book suggested will supply his need. The reader should, if possible, inspect the substitute to see that it is thoroughly acceptable. Since both sides of controversial subjects are usually classified and shelved together, there are opportunities for mistakes unless care is exercised. When fiction or general reading of a more or less recreational nature is involved, an even greater opportunity for service presents itself. A report that the book is out is not enough but in the same breath the librarian will suggest that a reserve be left for it and will also try to obtain the borrower's own suggestion for an alternative title. If familiar with the borrower's interests, a survey of the shelves of books recently returned, special displays and the general stacks should soon supply enough titles to leave with him if a more extended search is required.

The assistant will soon learn that *frankness in recommending books* is not advisable on every occasion. An opinion of a popular best seller if openly stated might offend or even shock a person belonging to the class of readers responsible for the popularity of the book. There are always things which can be said without undue enthusiasm, perhaps quotations from reviews, or book notes. When a borrower happens to show tastes similar to his own, the librarian may have the pleasure of showing a genuine enthusiasm for the books recommended or discussed. By his way of talking about the books offered, the librarian can often make a reader prefer these to those for which they are substitutes. Condemnation of books must not be lightly undertaken. There are people whose desire for a definite book increases as critical censure accumulates. An assistant has no wish to add to the already abnormal demand for this type of book and if forced to express an opinion should give a detached and impersonal statement, phrased to discourage rather than to encourage curiosity. When a book is to be condemned for definite reasons, these should be stated convincingly.



In collections including all types of books, occasions arise when an unsuitable book falls into the hands of a very young person. Finesse is essential if this borrower is to be tempted with other titles, or persuaded to leave the undesirable book. If it has been chosen without knowledge of its contents, the assistant may dextrously substitute a book which can be recommended, and by suggesting that the questionable volume is "dry and introspective," or "a dull, psychological novel," induce the young person to relinquish the book voluntarily. Even if the book were chosen deliberately the same method could be tried with the young reader, who would possibly be sensitive to the question raised and at best would not care to argue it. An implied censorship on the part of the staff arouses resentment in young or old and should not be indulged.

The *special services* offered by the library can be most usefully stressed by the assistant qualified to utilize all the resources of the institution, not merely those immediately at hand. The privilege of reserving books can be suggested many times every day, and the use of renewal, particularly by telephone, is not to be overlooked. Vacation privileges offer many hours of delight if books are carefully selected, and if attractive and suggestive lists can be prepared. The specialist who finds the library unable to supply what he needs is frequently qualified to suggest for purchase titles that will be useful to other borrowers as well as to himself. The assistant may heed his advice with profit and the book collection may be improved through his recommendations of important books. As the assistant enlarges his acquaintance with borrowers' tastes, their interests, or their hobbies, books stumbled on at intervals may suggest individual readers and the telephone may be used to call their attention to these titles. If the borrower is not otherwise reached, a real and intelligent interest in finding the books he likes may be shown by sending a reserve notice with an explanation saying that this is a voluntary service.

The use of lists, bulletins, and other aids for meeting and satisfying borrowers' needs, to be discussed later, serves a double

purpose, offering as much help to the assistant, at a loss for suggestions, as to the borrower who wishes to help himself.

## 6. Helping the reader to help himself

No amount of repeated guidance, suggestion, or direction can yield the satisfaction that comes to most readers in a library from an independent ability to find what they want. Those who know their way about in other situations will certainly wish to help themselves in a library. If the borrower's confidence and esteem are won at the outset, his approach to the library and its services may be greatly altered. He may be helped toward a very comfortable self-assurance if he is shown about and if clear and specific directions are given indicating those points where his interests are best represented. A new borrower will, therefore, be shown, (a) the catalog and how to use it; (b) the arrangement of the shelves; and (c) the printed sources of information kept on file and commonly in use at every circulation desk.

(a) *The catalog and how to use it.* The assistant who issues a borrower's card may go with the reader to the catalog, or send him to a staff member whose definite duty it is to explain its use intelligently. A clear method of giving this information should be worked out and should include an explanation of the advantages of the card catalog over one printed in book form. The arrangement of the cards can be compared to that of a dictionary and if necessary a page in a dictionary can be shown to illustrate this point. The fact that books in the library can be found under the author's name, the subject, or the title must be made perfectly clear, as well as the use of cards referring from one subject to another. The reader should understand that the trays of cards are arranged in strict alphabetical order and that each is clearly labeled to show the section of the alphabet included. It is usually necessary to explain to the borrower, unfamiliar with catalogs, that a guide card is merely a guide, not an index to the contents of the tray.

When the explanation has been completed the reader is requested to look up a book. He can be instructed in filling out a call slip correctly and also in interpreting the symbols which indicate the location of books, particularly those referring to separate collections. The assistant can then see before leaving him if the explanation has been grasped. The practice of scheduling a special assistant at the catalog during busy hours brings excellent results to borrowers as well as to the circulation and other public departments.

(b) *The arrangement of the shelves.* Most libraries encourage readers for their own benefit to find books on the shelves, and for this reason shelf arrangement must be understood. This can best be made clear to the borrower by taking him directly to the book collection. If he has learned to use the catalog, and learned the significance of the call number in relation to classification and shelf arrangement, he has a sufficient understanding of simple terms to find books. The assistant will try to ascertain the reader's interest and will show him where the books he cares to see are shelved. From this point will be given a general idea of the arrangement, calling attention to special features of the collection; to display racks where new books are kept; to shelves where books of seasonal interest are to be found; and to any other features of the arrangement that seem useful and appropriate. The ability and power to analyze the borrower critically and to estimate his needs will govern all the information supplied by the assistant. If the details usually given the new borrower will obviously confuse and disturb that reader for whom the assistant must act, only the barest suggestion should be given as to where the books he may want will be found.

(c) *Printed sources of information.* At any well equipped circulation desk, a more or less constantly changing collection of ready reference books is kept. The borrower wishing to help himself will be shown the *Book Review Digest*. The *A. L. A. catalogs*, *The Booklist*, and the *Standard Catalog Bi-monthly* can be

consulted for suggestions for new titles and for crisp, enlightening comments. Various indexes of poetry, short stories, fiction, drama and essays, as well as printed lists of selected books are usually available, and the intelligent borrower finds them suggestive and helpful. The introduction of the borrower to these tools should be timed to suit his manifest needs. All readers are not equally well equipped to use these tools, and even the most intelligent borrower should be allowed to find his way among them gradually. The assistant's use of these aids as sources of information will later be treated in greater detail.

#### IV. OUTSIDE RELATIONS

##### 1. Unofficial outside relations

The assistant's personal outside relations are forces which make him what he is when he joins the library staff and largely govern his development. The alert staff member soon becomes well known to the public and presently finds that off duty or on, Sunday or week-days, night or day, at home or wherever he may be, he is a librarian. There is some compensation in this, though there may be also certain disadvantages.

The library profits in many ways if the assistant is interested and active in community affairs not directly connected with his work; if he goes to concerts and lectures, belongs to clubs, and knows in advance about plans for community activities. A personal interest in local movements provides the means of making for the library many connections not otherwise possible. The staff member who serves on boards of clubs or associations, put there solely by reason of personal endowment, can properly interest these groups in many phases of work carried on within the library. From these meetings can be reported advance information which may later cause demands on the library. Forewarned, the library can render better service. If the assistant is a graduate of a local school or a college with an alumni organization, he should keep in touch with this group. Broad interests and many varied contacts

should fill the life of the assistant when off duty. One who does other things in addition to work, though not to the point of neglect of duties, is a more interesting and interested person, usually more alert and, because of social relations, often more skilful and successful in handling people than he might be otherwise.

## **2. Official outside activities**

The members of the circulation department, because of their constant touch with all sorts of people, are often sent to speak for the library, at clubs or other meetings. Many community gatherings are held in the library and the branches, at which a member of the staff may give help in various ways. Since this assistant talks about books of all kinds with people of every taste and connection, he is naturally remembered when groups wish to hear books and related topics discussed. Parent-teacher associations, women's clubs, child study groups and many others find among the staff members those who are thinking constructively on topics of community interest. The request for a representative of the staff to speak would presumably come to the head librarian who may assign a qualified assistant to the work. In this case, the assistant's remarks are usually governed by library policy. He may also represent the library at local conferences or meetings, where he is not expected to speak. If the conference concerns matters of general interest, he may be called on to report the meeting to the staff and so benefit everyone. The library often cooperates in supplying an official representative to act as judge of contests, debates, and other similar civic activities. In most libraries, time is allowed staff members for attendance at library conferences. It is customary for a report of these conferences to be made to the whole staff. If several members are present, various topics for reports may have been assigned in advance and a spirited staff meeting can transmit some of the inspiration of such meetings to those who stay at home.

Because the circulation assistant represents the library in the public mind, whether on duty or off, whether he is young or ma-

ture, he gradually comes to the realization that certain conventions of behavior in public must be observed. This need in no sense limit social activities, but may merely suggest a point beyond which the librarian, as a member of an official group standing for certain ideals, does not care to go.

## V. COMPENSATIONS

The young person, fresh from college or library school, eager to respond with loyalty and enthusiasm to every call, ready to bend every effort to give unselfish and tireless service, may reasonably ask what are the compensations to be found in circulation work. It is to be hoped that in every library there is an experienced person who in himself, in his interest in the work and in his connection with it may exemplify day by day to the younger members of the staff some of the rewards that are to be won. The young librarian is entitled to guidance and to constructive, considerate criticism of his method of approach to the work. As an individual anticipating growth, he may be stimulated and spurred on through recognition of personal talents and resources. In that direction lie genuine achievement, the sense of progress and the enlargement of vision, so necessary if the higher aims of circulation work are to be realized.

The way to these intangible but satisfying remunerations to be gained from work with people and books may be pointed out to the beginner, but the pursuit must be his own, regulated by individual tastes, imagination and needs. If the librarian's interest in work is a serious one, he will from the beginning realize the compensations that time and experience will bring. These will dwarf hardship and difficulties and hold the successful circulation librarian against the attractions of other work. Among other rewards to be found in the library may be friendships with fellow staff members, based on a satisfying community of interests, perhaps on a common taste for books and people, and such friendships often wear better than older ones founded upon tradition and social connections which grow less binding as time passes.

The pleasures and the interests to be found in serving readers are picturesquely diversified. An observant assistant at a busy post speedily realizes that artificial social barriers do not exist in the library. Readers show themselves here with less self-consciousness than in most places, for in striving to fill the gaps which life has left in experience, people turn to books and real cravings come to the surface. Opportunities to assist in creative work and to provide inspiration and education in the broadest sense through books constantly recur, with results which cannot be estimated. The reader may be an individual driven by ambition and endeavoring to satisfy a hunger for knowledge. Or, he may be a member of a group following a plan carefully prepared to enlarge the outlook of its members. In many libraries no special staff member is provided to care for this service and the reader trusts to the circulation assistant for guidance. Such service entails a serious responsibility and great opportunities for growth and increased usefulness in the library as well as in the community.

*Recreational reading* for the borrower likewise assumes an importance worthy of recognition, and the desires that may appear trivial are entitled to careful consideration. In many instances the assistant may supply adventure for prosaic lives, travel for those who must stay at home, romance for some who have been denied it, or biography for readers who would lift themselves out of their own surroundings into the wider experiences of others. Drama is not only to be found behind footlights, and poetry is here for all. If the assistant has acquired a habit of wide reading and a real catholicity of taste, he may find himself in the pleasant position of a reader capable of advising another reader. Successful selection of books for readers who are timid and slow to translate wishes into words implies an intuitive sympathy and understanding, an impersonal intellectual curiosity and imagination on the part of the librarian. The response to the successful choice of books may give satisfaction out of all proportion to the effort involved.

Different, though no more varied, are the interests which result from serving the cultivated men and women of the community. In such connections the assistant may frequently find his professional skill called on to supplement a knowledge wider than his own. But if the aids and materials provided for such use are handled intelligently, the service will usually be properly appreciated. Through such associations one who is alert can glean useful facts concerning materials in the library, bits of charming book talk, keen observations on authors and critics, suggestions of community happenings, glimpses of contacts which cover the whole range of human activity.

It is possible only to suggest a few of the compensations that the assistant who is a book lover and who likes people may find in bringing together for pleasure and profit the library's readers and its books. Joy and interest in one's work may mean different things to each individual on a staff, but whatever they signify, a growing, developing process for the individual should result. For as one's interests expand boundaries widen. The assistant who recognizes opportunity may see that there lies before him a service which must be based on a close relation with elemental human motives and impulses as well as books. But he may not realize at the outset that from his work may grow an interest which crowds out many scattered activities, and a personal satisfaction which never grows stale.

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#### THOUGHT QUESTIONS

1. Enjoying contacts with people is one reward of work at a circulation desk. Do you get this pleasure out of it? Give some cases to illustrate your answer.
2. In your practice work at a circulation desk make a verbatim record of three typical interviews with readers of different types to illustrate the questioning necessary to determine their actual needs.
3. A new borrower asking for *St. Elmo* presents herself. The title is not available. What will you give her as a substitute?
4. Draw up a set of rules for your own guidance in substituting material when that specifically requested is not available.

5. Granting that some censorship is necessary, in dealing with the reading of minors at least, when and how do you think this censorship should be (a) relaxed, and (b) omitted?
6. List the ways by which you would systematically endeavor to enlarge your acquaintance with books in general, and those in your library in particular, if you were newly appointed to service at a circulation desk.
7. Tell in your own words why you think the assistant at the circulation desk occupies a position of importance to the library and the community.
8. What mistakes may be made by an assistant who knows only the circulation department and fails to comprehend the scope of the library as a whole?
9. If possible, visit a library where you are not known and use the circulation department as a stranger. Write in detail the story of just what was said and done. Enumerate the strong and weak points of the service.
10. Discuss what is meant by "harmonizing routine with a broad ideal of service," page 14.
11. How would you meet and endeavor to satisfy the reader who says:
  - (a) "I never can find anything new in this library."
  - (b) "I want to take the current issue of *Who's who* out on my card."
  - (c) "Please give me a *book* on the present religious difficulties in Mexico."
  - (d) "I am looking for one volume which will give me an outline of the most important political issues before each cabinet since Washington's."
  - (e) "I can not find what I want." (Questioning by the assistant reveals that the reader does not know what he wants.)
12. What differences might be observed in the types of contact made:
  - (a) By one assistant who believes that the chief end of library reading is for amusement, and
  - (b) By another assistant who visualizes the educational objectives as well.
13. The salesman in a department store has the following duties to perform:
  - (a) Approaching the customer,

- (b) Defining the customer's needs,
- (c) Displaying the merchandise,
- (d) Giving the talking points of the merchandise so as to assist the customer in his selection,
- (e) Leading the customer to make a satisfactory selection,
- (f) Closing the interview in such a way as to make the customer want to return to the store.

Apply this parallel to the work of the assistant at the circulation desk.

- 14. Formulate five rules of conduct to be observed to advantage by desk assistants.
- 15. Develop in detail a plan showing how you would explain the use of the catalog to a business man who is unused to libraries. How would you modify your method in teaching a high school student who is familiar with his own high school library?
- 16. In what civic and community activities do you take part? How may these contacts be of importance to the library and to you as a circulation assistant?

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## CHAPTER 3

### Registration of Borrowers

- |   |                                    |
|---|------------------------------------|
| I. PURPOSE  | VI. RE-REGISTRATION OF BORROWERS   |
| II. ROUTINE   | VII. COUNTING REGISTRATION         |
| 1. Issue of application card to resident adult          | VIII. RELATED DUTIES               |
| 2. Entry of registration                                | 1. Changing address                |
| 3. Issue of borrower's card                             | 2. Borrower's card left at library |
| III. REGISTRATION OF JUVENILE BORROWERS                 | 3. Borrower's temporary card       |
| IV. BRANCH REGISTRATION                                 | 4. Borrower's lost card            |
| V. REGISTRATION OF NON-RESIDENT AND TEMPORARY BORROWERS | 5. Rewriting filled card           |
|   | 6. Surrendered borrower's card     |
- 

#### I. PURPOSE

When a library lends a book to a borrower it must have enough information about that individual to insure the return of the book, as well as to protect the other members of the community who ultimately may want to read the same volume. Underlying business principles require that the person who wishes to use the library show that he is trustworthy and that he meet the regulations laid down by the institution. Today the ideal of service is usually liberal, requiring only a minimum of cooperation on the part of the borrower.

The records of registered borrowers which libraries in general find necessary are: (1) a record of patrons by name, usually an alphabetical file of original application cards filled out by the borrowers when applying for library privileges; (2) a record of the registration numbers assigned to borrowers. This is a chronolog-

ical file of borrowers, arranged in the numerical order in which borrowers' cards are issued. Books are charged by number and not by name, thus both the alphabetical and numerical files prove useful. For instance, the borrower's number has to be found and only the name is known to the assistant, or the whereabouts of a book must be traced and the only key to the records is the borrower's number.

The registering of borrowers may be briefly outlined as follows:

The resident borrowers of a library are usually divided into two groups: (1) adult borrowers, (2) juvenile borrowers. In addition the library often desires to extend its privileges to those who are (3) non-resident, within reach of its service; and (4) temporary residents, which may mean students or other less permanent, transient population. Different information is required from these groups in order to fix responsibility and safeguard the library.

In order to keep the file of borrowers up to date, it is usual to put a time limit on borrowers' cards, and to require re-registration at the expiration of a definite period.

## II. ROUTINE

### 1. Issue of application card to resident adult

In planning the organization of the library, the librarian will decide what information about the borrower should be kept on file. An application form will be adopted which incorporates the items considered necessary, and from this information the various records will be made. The usual items are: (1) full name of borrower; (2) home and business addresses; (3) occupation; (4) telephone number; (5) date.

When the applicant for a library card presents himself at the registration desk, the assistant has the first opportunity to create a good impression of the library. The steps necessary in registering should be enumerated slowly, clearly, in order, and with as little amplification as possible. Although the assistant knows so well the

## CIRCULATION WORK

No. <u>2075</u>	
<u>Brown, Marion Lawrence</u>	
This application should be written in INK only. Do not write on the line above.	
Expires. <u>Apr. 2, 1930</u>	
I hereby agree to obey all the rules and regulations of the Public Library, to pay promptly all fines charged against me for the injury or loss of books, and to give immediate notice of any change of address.	
Mr., Mrs., Miss <u>Marion Lawrence Brown</u> ( <u>Mrs. Fred A.</u> )	
(Cross out two)	(First Name) (Middle Name) (Last Name)
(Married women will designate husband's name)	
Residence <u>756 Dover St.</u>	Telephone <u>Rep. 3600</u>
Business Address <u>85 Grand Ave.</u>	Telephone <u>Main 7200</u>
Occupation <u>Commercial Artist</u>	(Over)

Reference	
Name <u>George T. Harper</u>	
Residence <u>36 Oak Street</u> Telephone <u>Main 8591</u>	
Business Address <u>85 Grand Ave.</u> Telephone <u>Main 7200</u>	
Special Interests: <u>Commercial Art</u> <u>Gardening</u>	Miscellaneous records: (Do not write in this space)

ADULT APPLICATION CARD—Front and Back correctly filled out

directions being given, the applicant hears them for the first time. They should not sound formidable, confusing, or perfunctory.

(a) *Signing name and address.* In most libraries the assistant asks the applicant if he has registered before. If not, he is asked



to sign his name on an application card, usually below a brief pledge to obey the rules of the library. In some libraries the applicant himself writes all the necessary information. In other libraries, the applicant signs his name only, and the assistant fills in the other information, thus shortening the registration process. The application card usually must be filled out at the library, though a liberal policy often permits the reader to sign a card at home, or to take a card to someone who cannot easily come to the library. As a rule a husband may sign for his wife, or vice versa, though there are libraries where such signatures will not be accepted.

The *form of name* is important. It is clearly essential that the signature be so given that it indicates at a glance whether the applicant is a man, an unmarried or a married woman. When a married woman signs either her own or her husband's name, a note of the other name on the application card may be a convenience for numerous purposes. With postal difficulties and frequent changes of residence in mind, it is also important that full names be signed rather than initials. This is particularly necessary with common names.

(b) *Identifying applicant.* Most libraries feel the need of verifying the information supplied by the applicant. The usual procedure is to look for the applicant's name in the union file of registered borrowers and if it does not occur there, to consult the city or telephone directory, according to local practice. Tax receipts and membership cards may also serve as identification, or the delivery of a postcard mailed to the applicant's address may be the practice. Although some libraries require references or guarantors, the practice of securing the signatures of either, but especially of guarantors, for resident adults is decreasing. The signature of a reference may sometimes be required when the applicant cannot be otherwise identified.

If a reference is required, his name and address are usually added to the application by the borrower. If a guarantor is required, the applicant must secure his signature to an agreement to

assume responsibility for the borrower's observance of library rules. He must be a responsible person, usually a resident easily identified. In some small libraries and in branches it is customary to allow the applicant to use the library while securing the signature of the reference or the guarantor. This is arranged by issuing a temporary card which must be destroyed when the borrower receives his permanent card.

(c) *Checking application card.* When the borrower presents an application card properly filled out, the assistant in the borrower's presence checks each item for accuracy and uniformity of information. The name and address of the guarantor or the reference are verified in the city or the telephone directory or in the library files, and the reader's name is checked. If the signature is unusual or illegible, the borrower is questioned as to the spelling, and in order to save later query the name may be entered immediately on the top line in inverted order for purposes of filing.

## 2. Entry of registration

(a) *Assigning borrower's number.* When the application card has been accepted, a borrower's number is assigned. This may be done with one of two records: registration book, or numerical card file. In either case the same information is incorporated in the record.

*Registration book.* This form of borrower's record is reminiscent of the days when a borrower signed his name in a book in order to use the library. The book may be a loose-leaf volume, whose sheets are ultimately bound for preservation; or it may be an adaptation of any book used to record detailed business transactions. Each line is numbered, and each number represents the borrower whose name is entered on the line. The compactness of form, the ease with which it can be used in tracing borrowers by number, the permanency of the record, and the impossibility of wrong filing are points claimed in its favor. The book can be used by only one person for one purpose at one time, and here is the chief disadvantage. It is not possible to enter registrations in such a book and

to use it in sending fine notices at the same time, unless it is of the loose-leaf type. However, in one large library there are two registration books, one for odd and one for even numbers, used on alternate days, so that while registrations are entered in one book, the other is available for sending fine notices. In many well-organized libraries, one assistant is responsible for registration and another for overdues, and a routine may easily be established whereby the two activities do not conflict.

*Numerical card file.* This file consists of a card for each registered borrower filed by the number assigned in the order of issue. The card so filed usually gives the borrower's number, name in inverted order, address, and date. The advantages of the numerical card file are those common to card files: possibilities of growth, of keeping the file alive by withdrawing records and by rearrangement of drawers, and of permitting more than one assistant to work on it at once. The space it occupies and the effort involved in using it are disadvantages.

*Process.* In assigning the number, the next unused number recorded at the desk is assigned to the borrower and written on his application card and other records. In small libraries the applicant's name is often entered at once in the registration book on the next vacant line, or a numerical card is made using the first unused number. In larger libraries, one of the following methods may be adopted, anticipating completion of the numerical record later: (1) an automatic numbering machine may be used on all the borrower's records; (2) blank borrowers' or numerical cards in blocks of various sizes may be numbered in advance, to be used in order; (3) duplicate lists of numbers to be assigned may be kept on file at registration desks and checked as used. In such cases, while the borrower waits only information essential to later completion of the record is entered.

(b) *Assigning date.* The date on the application card serves two purposes: (1) to indicate when the borrower's card will expire; (2) to check the number of registrations during any definite period. The policy of the library determines whether the date

recorded is that of the issue or of the expiration of the borrower's card. In some instances both dates are incorporated in the records. If only the date of issue is used, the borrower must be informed that this card expires automatically at the end of a definite period, usually from two to five years. If the registration number is chosen from a specific block or series, the date of expiration will be thus indicated and no record of date is necessary.

### 3. Issue of borrower's card

The necessary information is transferred from the application to the borrower's card, which is always of a convenient size to carry in the pocket of a book.

(a) *Writing borrower's card.* The registration number is copied in the proper place on the borrower's card. The borrower's name is written or printed in regular or inverted order; the address is entered, and the date of issue or expiration of the card. The borrower then receives his card, on which will be charged any books which he draws from the library.<sup>1</sup>

The use of a borrower's card is not universal. In some large libraries the adult borrower receives instead an *identification card*, on which no books are charged. In some very small libraries, where few readers are to be served at once, no borrower's card is given the reader. He registers and his whole record is kept for him at the library. His registration number is looked up in the alphabetical file each time he wishes to use it and his books are charged to that number.

(b) *Deferred issue of borrower's card.* Some libraries require that the borrower leave his application and wait for a short time for the completion of the library records. The delay may be necessary for assigning numbers or identifying the borrower; or the borrower presenting an application may not wish to use the card immediately. In any case, the assistant checks the information in the applicant's presence as previously described. The application is put aside and when a number of them have accumulated, usually

<sup>1</sup>See Chapter 4, p. 82.

the next morning, the assistant carries through the whole process of registering as above described. The completed borrower's card is held for the borrower or mailed him.

(c) *Informing borrower of privileges.* In explaining the use of the borrower's card and in making the new reader familiar with his privileges, the assistant has another valuable opportunity to show *skill in clear statement and handling the public*. Libraries usually distribute printed rules for drawing and returning books. Frequently this statement of privileges includes suggestions which direct the borrower to other departments of the library; or call attention to special privileges for various types of users; teachers' privileges, vacation privileges, etc. The attention of the new user should be directed to the location of the catalog, to the open shelf, reference, or children's rooms, and the information desk. The assistant, shrewd in her judgment of people, will not confuse the new borrower by giving him in detail information which use of the library will bring to him. If the reader is made to feel at the outset that questions will be cheerfully and carefully answered as they occur to him, the librarian will have done well.

(d) *Completing records.* Records are usually completed at the registration desk once a day, at a time when there is the least rush of work. Whether the system uses a registration book or a numerical file, a numerical record must be made. In the registration book this is done by writing the necessary information, name, address, and date, on the line bearing the same number as the borrower's application, or by checking this information if it has already been entered. For the numerical file a duplicate card containing similar information is made out or checked. On the original application card bearing the number and date, the borrower's name must be entered on the line provided, or verified if already entered. In either system the application must then be filed.

This application is usually filed to form the alphabetical list of borrowers by name. Or, if preferred, it may form the nu-

merical card file. A second card incorporating less information, usually the number, name, address and date, then forms the alphabetical file. The advantages of this arrangement are clearly shown when consulting the file in sending fine notices. The original application card giving full information can be found by looking up the borrower's number. This saves a search first under the number and then in the alphabetical file for the name of the reference, or place of business, or other items not included on the less complete card.

### III. REGISTRATION OF JUVENILE BORROWERS

It is an advantage for a library to be able to ascertain readily from its registration record which of its borrowers are juvenile. This can be done by incorporating in the system of juvenile registration distinctive features which are easily recognized.

#### 1. Handling of application card

Many libraries incorporate into a single application the information required of both juvenile and adult borrowers. Other libraries use a different form, frequently of a different color. All libraries prefer, and some require, that the child sign his full name and address at the library. The age of the minor, and the name of the school and the grade are often necessary items of information. The size of the library and other local conditions usually determine what information the library needs for placing responsibility for juvenile as well as adult borrowers.

(a) *Identifying*. It is an almost universal practice to require the signature of a parent or guardian as guarantor for the juvenile borrower. The business address of this guarantor is often asked as a means of tracing a child who has moved. Many large libraries also find it useful to have the signature of the teacher as an additional reference.

(b) *Checking*. The rush of work occasioned by crowds of children coming to the library at the close of school often renders it impossible to do more than check the application in the child's

No. ....

.....  
Do not write on the line above.

Expires. ....

When I write my name on this card I promise to take good care of the books I use in the Library and at home, and to obey the rules of the Library.

Name .....  
Write name in full and with INK only

Address .....

School .....

Grade..... Age.....

Intermediate privileges granted.....  
(Over)

*To be filled out by parent or guardian:*

I am willing that my-(<sup>son</sup> daughter) .....  
aged....., shall borrow books from the Public Library, and I promise to make good any damage or loss and to pay any fines justly charged to (<sup>him</sup> her )

Name .....

Residence ..... Telephone.....

Business Address ..... Telephone.....

Miscellaneous records: (Do not write in this space)

JUVENILE APPLICATION CARD—Front and Back

presence for legibility and complete information. The child may be given a book on his name if the policy of the library permits.

(c) *Numbering.* After the checking of the juvenile borrower's application the processes of registration are usually the same

as for a resident adult. The following variations of procedure are found: (1) *Juvenile borrowers' numbers* often incorporate a distinguishing symbol, an initial or zero which precedes or follows the borrower's number; (2) a block or separate series of numbers may be assigned; or, (3) juvenile borrowers' cards may be of a different color.

## **2. Issuing juvenile borrower's card**

The method of issuing the juvenile borrower's card is a repetition of those processes outlined for the resident adult. Especial care will be taken in making the child familiar with his privileges and the rules which he must observe in using the library.

# **IV. BRANCH REGISTRATION**

## **1. Making union files**

It is generally felt to be important that all the original application blanks signed by borrowers be kept in a union file at the main library. This file can answer various questions about registration and give statistics of the number of borrowers and their distribution through the branches and stations of the system. Therefore some plan for the duplication of records must be devised. Each branch needs sufficient information to enable it to trace overdue books, issue duplicate cards, and make statistical records of use.

## **2. Meeting uniform requirements**

The branch librarian meets the new applicant with the request for the same information asked at the main library. Uniformity in the procedure and a similar attitude to rules and regulations is of great importance. "It is not done that way at our branch" usually means that something needs investigation.

## **3. Making and filing of duplicate branch records**

In some library systems the borrower who registers at a branch is asked to sign and fill out two application cards. These applica-



tions are checked (a) with the branch file of borrowers, to avoid duplication, and (b) to see that the applications bear the symbol or name of the branch receiving them. Both are sent to the main library, where a registration number is assigned and one application card is incorporated in the union file and the other returned to the branch. In the meantime the branch library frequently issues a temporary card to be used until the records are completed; or, a partially filled out borrower's card may be issued for charging books and kept on file for completion, when the records shall have been received from the main library.

Branch numbers may be assigned in sequence as cards are received at the main library; or, blocks of numbers to be used may be assigned by the main library; or, a separate system of numbers incorporating a branch symbol may be in use; or, numbered sheets from a loose-leaf registration book may be sent to the branches.

The branch may make two duplicates of the original application during the registration of the borrower, and send three cards to the main library—the original and one duplicate to be incorporated into the union files after checking, numbering and dating. The third card, after being filled out with number and date, is returned to the branch. The process of comparison with the union file and of numbering is the same as in registering a resident adult or juvenile borrower at the main library.

At the branch library the record is completed upon receipt of the returned duplicate card. The branch librarian enters the number and date on the borrower's card and checks all cards. The record is entered in the registration book, kept for borrowers of the branch, or the numerical card is filed. The borrower's card, when not sent from the main library, is made, or, if partially filled out for temporary use, it is completed. This card is filed until called for by the reader. In some libraries a list giving the information needed is sent to the main library with the branch registration cards which are to be filed in the union file. This list is returned to the branch with a report on each entry and a number and date assigned each borrower.

## V. REGISTRATION OF NON-RESIDENT AND TEMPORARY BORROWERS

A library wishing to render a broad, generous service has an opportunity in the registration of non-resident and temporary borrowers who desire to avail themselves of its privileges. The library must be safeguarded, and since non-resident and temporary borrowers are frequently difficult to trace, special precautions must be taken in issuing these cards.

### 1. Non-residents

It is necessary for the administration to define the classes of non-residents to be served and to state definitely the limitations of this service. Common practice accepts two classes of non-resident borrowers, i. e., those who are allowed free use of library resources and those to whom these privileges are granted on payment of a fee. To the first group belong (1) *students* in public schools, for the period of the school year, though non-resident students in private schools may be required to pay a fee. Where free privileges are granted, the student is often asked to give as reference a teacher or an official of his school or to show a receipt for tuition. (2) *Non-resident tax payers*, identified by a tax receipt, usually receive free service since they contribute to the support of the library. (3) Frequently *non-resident employees* with business addresses in town or county are allowed free access to the library. All other applicants living outside the legal boundaries of the library service area and falling under none of the above exemptions may be allowed library privileges on payment of an annual, semi-annual, or monthly fee.

*Issuing non-resident application.* The non-resident, following general library rules, fills out the application card. Identification is usually required for all non-resident borrowers, either by guarantor or reference. If no fee is paid the date incorporated in the records indicates the period for which the service is granted. If a fee is collected for one year at a uniform rate, the date of ex-

piration appears. In checking these applications, the same care is needed as with other similar records, and the general rules laid down for the system are followed. The policy of the library as to the treatment of records will usually be guided by the number of such cards issued. The applications may be entered and filed separately, or with the records for resident borrowers.

Non-residents are given borrowers' cards similar to those of resident borrowers, though some libraries incorporate a symbol, such as "N.R.," in the registration number; or registration numbers from a specified block are set aside for non-residents' cards. If the fee has been paid for a period shorter than the regular term of one year, the amount should appear on the borrower's card. All of these devices call attention to the variation in procedure. These borrowers' cards carry with them the usual privileges and responsibilities, but they are frequently issued for a shorter period.

## 2. Temporary borrowers

With people who find themselves in a strange place for a short period, the library has another interesting opportunity for service. The stranger who turns to the library for needed information, or perhaps equally needed recreation, is entitled to the best service that can be given. He may be used to some other library or he may be a person ordinarily out of reach of libraries who wishes to take advantage of the present opportunity.

(a) *Issuing application card to temporary borrower.* The signing of the application under these conditions is a mere matter of form, a gesture to make the transaction appear as regular as possible. In some libraries the transient signs his name, local address, and, as a precautionary measure, his permanent home or business address. The card can then be issued without delay since it is unusual to assign registration numbers to temporary borrowers. In this case books are charged to the name of the reader.

(b) *Collecting deposit.* A deposit is usually asked of temporary borrowers to insure the library against loss. Some libraries col-

lect a flat fee varying from \$2.00 to \$5.00 a volume. Other libraries require that the deposit cover the value of the book if it exceeds the minimum deposit, and this seems the fairer practice.

(c) *Issuing receipt.* It is customary to issue a receipt as well as a borrower's card to record this transaction. Since these cards are often used only once or twice, it seems unnecessary to keep all the permanent records of registration. The receipt, giving the name, address and amount of deposit, may be numbered. The entry may be made in a receipt book with a stub to be filled out. When a numbered receipt is used, this number is sometimes used as the borrower's number, preceded by a symbol such as "Dep."

(d) *Issuing borrower's card.* The amount of the deposit is entered in a prominent place on the borrower's card. In charging books on these cards, the assistant sees that the value of the books drawn does not exceed the deposit to any great extent. A close check must also be kept on the length of time this card is valid. The privilege is intended for transients. When the borrower continues to use it beyond a reasonable period, he is properly offered a non-resident card instead. He will thus pay the library the small fee to which it is entitled instead of securing books and having the use of the library without charge, since the deposit is usually returned intact if no fines are due. This type of borrower needs a clear statement of his privileges and the lending rules when the card is issued. The circulation assistant will wish to be sure that this borrower understands where to go for the information wanted, as well as how to get it.

(e) *Refunding deposit.* When the transient reader wishes to close the transaction with the library, the books, library card and receipt must be returned. The library card is carefully checked for uncanceled charges or outstanding fines. If the record is clear, the library assistant keeps the card and refunds the deposit, for which the borrower signs a receipt. The date should appear on this record. If the receipt is a numbered one, taken from a book where a stub further records the transaction, this stub should be canceled, thus closing the transaction. The library's method

of handling the deposit and making the necessary records of the cash transaction will be more fully discussed in Chapter 6.

## VI. RE-REGISTRATION OF BORROWERS

### 1. Purpose

In order to make the library file of registered borrowers a record of current users, not merely a list of those who at some time have availed themselves of library privileges, it is necessary that a limit be placed on the period of usefulness of the borrower's card. The length of time for which a borrower's card is issued varies from two to five years, depending on the size of the community and the stability of the population. The card must be renewed when that period has expired.

In most libraries cards expire day by day, and if the records are handled in this way, re-registration is a simple matter. The cards made out and dated on any definite date expire automatically. For the convenience of the public, and to assist the staff in checking, the numbers to be canceled are often arranged in blocks, having been issued during the corresponding week or month at the time of registration. These inclusive numbers are frequently posted at desks for the information of assistants who charge books. In some small libraries, all borrowers are required to renew their records at stated periods, rather than by a system of continuous re-registration.

### 2. Renewing records

Most libraries require that a new application card be signed by the borrower, and many then carry through the procedure of registration without variation. In such cases the borrower is assigned a new number. Before a new borrower's card is issued the borrower's record is checked to see that it is clear. If not, it seems only fair that he should pay or arrange for delinquent fines or penalties before receiving a new card. Almost all libraries destroy the expired card after giving the borrower a new one in its

place. Many libraries which require the signature of a reference for a first registration waive this requirement when re-registering and allow the borrower's record to serve as a guide to his trustworthiness.

Re-registration records are usually substituted in the file for those made originally. A few libraries file canceled applications for a short period, but it seems better practice to destroy these records as replaced. When the reader fails to apply for re-registration a printed notification is sometimes sent asking him to renew his card and resume his use of the library. The names of readers whose registration has expired can be found by checking the registration book or the numerical file to cancel all such records. Thus the effort to secure the renewal of borrowers' records becomes a matter of routine and can be planned to meet local conditions.

### 3. Transferring juvenile borrower

Differences of opinion exist as to the age when the child who is a registered borrower should be transferred from the juvenile to the adult department of the library. This problem is being faced practically in many libraries working in close cooperation with schools. Good practice in the past has suggested that the child's registration be transferred when he enters high school. The age is sometimes taken into consideration. For the child not in school the age determining the time for transfer varies from 14 to 16 years.

(a) *Intermediate card.* An idea suggested to librarians by junior high schools provides for a transition rather than a direct transfer from the children's room to the adult department. This is accomplished by providing the child with an *intermediate card*, indicating to the staff that he should be using both adult and juvenile departments, under special though unobtrusive supervision and guidance in each place. If the child's juvenile registration is in force, his borrower's card is marked with the intermediate symbol. If it has expired, he re-registers in the adult department

and the intermediate symbol is entered on the adult card, which he uses until he is regularly transferred to that department. In some libraries special collections are assembled for intermediate use, and interesting developments are being made in this work.

(b) *To adult department.* The process of transferring a juvenile borrower to the adult department is usually based on the signing of an adult application card, if the two applications differ. The child's record in the children's room must be checked and his right to an adult card indicated, usually by means of a slip signed by the children's librarian. In libraries using one system of numbering for all borrowers, the unexpired registration number and date may be transferred to the new application card. When this has been properly filled out, returned and checked by the assistant, the juvenile registration records are withdrawn, or the transfer is indicated on them. If the juvenile registration is designated by a symbol, this is a very simple process. But when it is indicated by the number itself, a new number must be assigned and a new borrower's card issued. A new card is also necessary when the juvenile borrower's card is of a special color. Some libraries mark the juvenile borrower's card to show that it carries adult privileges, and allow it to be used till the number expires. The assistant must be sure that the transferred borrower understands the differences in rules and privileges in the juvenile and adult departments and knows where to go for the help he is likely to need.

## VII. COUNTING REGISTRATION

As the final step in completing the library's record of the registration of borrowers, a count must be made. For method of assembling these statistics see Chapter II, page 245.

## VIII. RELATED DUTIES

**1. Changing address**

The library needs an accurate record of the addresses of registered borrowers. Many application blanks incorporate, as part of the pledge which the borrower signs, a promise to notify the library of a change of address. When the borrower in small libraries reports this change, the record is corrected at once from the verbal notice. The old address is crossed off the alphabetical record and the new one entered. From this card the registration number is obtained and the corresponding change is made in the registration book or the numerical card file. The borrower's card is also corrected.

In larger libraries where it is impossible to carry this process through immediately, the borrower's card is changed and a form is usually filled out by the borrower or the assistant. This form contains spaces for the borrower's name, old address, new address, and the borrower's number. When a number of these forms have accumulated, they are arranged alphabetically and a search is made in the name file. The old addresses are crossed out, the new are entered, and the borrowers' numbers are copied in the blank spaces provided for them on the form. The slips are rearranged by number, and are searched in the registration book or numerical card file, where similar changes of records are entered. Branches make similar changes in their files. They are allowed to accumulate and at intervals are brought or sent to the main library to be incorporated in the union file.

**2. Borrower's card left at library**

The library usually expects the reader to keep his borrower's card in his possession and present it when he wishes to have books charged. However, some provision must be made for those occasions when it is necessary to take care of this card for the borrower. Many libraries refuse to file a borrower's card which has no penalties attached, or they discourage the practice by hold-



ing the borrower responsible for his card, whether he leaves it or not. In other systems the borrower's card may be left at the library and is filed either before or behind the original registration card in the alphabetical file. Or, a separate alphabetical file is kept in which borrowers' cards, either held or left, are arranged by name. Certain infringements of rules, varying in different systems, cause the library to deprive the borrower of the use of his card. In such cases it is held until the penalty or fine is paid, when it is returned to the borrower.

### **3. Borrower's temporary card**

Most libraries make some provision for those readers who come without borrowers' cards and wish to draw books. It is customary to issue a temporary card different in appearance from the regular borrower's card. This card contains the number, name, address and current date, and is often filed at the library in order to be sure to have it when the borrower's card is brought back. Many libraries limit the number of such cards which may be issued to a borrower within a given time, and some limit the number of books which may be drawn on a temporary card. On rare occasions some libraries charge books to a known borrower's name.

### **4. Borrower's lost card**

The loss of a borrower's card is more or less serious since, under library rules, the owner is held responsible for any use of the card. When the borrower reports the loss of a card, the assistant takes his name and address on a form prepared for this purpose. The file of borrowers' cards left at the library or the alphabetical file of applications is first searched. If the card is not on file, and the name of the borrower appears in the alphabetical file, the borrower's number and the date are added to the slip. Most libraries discourage the issuing of duplicate borrowers' cards by requiring an interval to elapse for search before the free issue of a duplicate. This may be one or two weeks. If made out at once, in order to oblige a borrower in urgent need of a card, a nominal

charge, usually 5 or 10 cents, is made. The slip recording the transaction may be given the reader, to be presented when the borrower's card is to be issued, or it may be filed alphabetically by the name of reader. The borrower's card must be in every sense a copy of the original card, and should be clearly marked "duplicate" or bear a symbol to show duplication. As a record of this transaction the date for each duplicate issued is usually entered on the back of the borrower's original application, as a check on the number of duplicates issued.

Frequently the assistant finds that the reader applying at the registration desk has been registered before. If the record is clear and the card has not expired, the reader is requested to fill out an application for a duplicate borrower's card. If there are charges against him, he is given the opportunity to pay them. If his card has expired, he is asked to re-register.

### **5. Rewriting filled card**

A new card must be written when a borrower's card has been filled. Before copying, it is well to ask the borrower if the address is correct, noting a change, and to check the card for uncanceled charges, which should be copied in ink on the new card.

### **6. Surrendered borrower's card**

A borrower leaving the city often wishes to surrender his card and sever his connection with the library. Such cards are marked at once, either with a symbol, or a descriptive note such as "surrendered," "leaving city," or "deceased." These cards are usually destroyed after cancelation of the borrower's record in the registration book or numerical and alphabetical files.

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Automatic re-registration for a small library.

### THOUGHT QUESTIONS

1. Discuss the relative merits in a small library and in a medium-sized library of:
  - (a) Registration book.
  - (b) Numerical file of borrowers.
  - (c) Borrower's card for the resident adult reader.
  - (d) Identification card for the resident adult reader.
  - (e) A numerical file of original applications for borrowers' cards.
  - (f) An alphabetical file of original applications for borrowers' cards.
2. Why is it important to register borrowers in a public circulating library?
3. List in two parallel columns the steps in registering the regular adult borrower and the regular juvenile borrower. Note the differences in procedure and give reasons for these.
4. Do you prefer two, three, or five years as the term for which borrowers' cards are issued? Why?
5. Would you arrange to file borrowers' cards at the library or require that borrowers carry their own cards? Why?
6. In the public library with which you are familiar, is identification of applicants needed? Why?
7. In libraries requiring guarantors or references, how may the procedure of re-registration vary and why?

8. Obtain five blank application cards and instruct five of your friends outside the classroom to fill out the cards properly. Verify these cards as though preparatory to accepting them for registration. Have another member of the class verify your checking.
9. Name two points in the registration process where the assistant may create a good impression of the library. Compare (a) the opportunity, and (b) the importance of creating this impression (1) in a smaller library, and (2) in a very large library.
10. How far in your opinion is a library justified in extending its privileges to non-resident and temporary borrowers? Give reasons.
11. Outline procedures for registering (a) a non-resident adult, and (b) a temporary borrower. Give reasons for any variations from the regular procedure.
12. When would you transfer a child from the children's room to the adult department of the library? Why? Give reasons for and against the use of the intermediate borrower's card.
13. What difficulties arise if prompt record is not made (a) of a change of a borrower's address, and (b) of a surrendered borrower's card?
14. Prepare a form for an application card to be used for both adult and juvenile borrowers.
15. How would you handle the problem of the borrower's lost card, with fairness to the reader and the library?
16. Should the use of borrowers' temporary cards be limited? Give reasons for your answer.
17. List the policies affecting registration which indicate a tendency on the part of libraries to extend their service freely and widely. What are the advantages and dangers?

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## CHAPTER 4

### Charging Systems

#### I. HISTORY

1. Ledger system
2. Dummy system
3. Temporary slip system
4. Permanent slip or card system
5. Browne system
6. Newark system

#### II. CHARGING BOOKS

1. Setting date stamps
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3. Checking book records

4. Making the charge

#### III. FILING BOOK CARDS

#### IV. DISCHARGING BOOKS

1. Canceling regular charge
2. Receipt for book returned without card
3. Canceling overdue charge
4. Slipping books

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#### I. HISTORY

From the days when a librarian's chief ambition was presumably to keep every book in its place on the shelves, the effect of ever closer contact between librarian and borrower has been to liberalize book distribution by simplifying procedure. The development of various charging systems in public libraries has been rapid. Within the last half-century many definitely different systems of recording circulation have been in common use in libraries, and the relative merits of each has been vigorously debated. Among the earlier systems are four, traces of which still survive: (1) the ledger system; (2) the dummy system; (3) the temporary slip system; and (4) the more recently used permanent slip or card system. From the last has developed those systems in common use in public libraries today. (5) The Browne system is typical of several systems which have practically been superseded by (6) the Newark charging system.

### 1. Ledger system

The original charge for the volume borrowed was a simple daily record made in a day book, often receipted in the margin by the borrower. It was a real step forward when libraries began to post these daily records in a ledger to avoid searching through the day book to find a single entry. The pages of the ledger were numbered and each page number became the registration number of the borrower whose name headed the page. The call number of the book drawn and the date of issue were noted in columns ruled for the purpose. On the return of the volume the entry might be crossed off, or the date of return set down. The advantages of this system, as found by the generation using it, were the small amount of space needed for this record, the ease with which charges were found, and the fact that a borrower's taste in books was clearly indicated as a guide for the librarian. The disadvantages were the impossibility of an alphabetical file, the difficulty of replacing pages, and the time required for entering charges while the borrower waited. A reader might fill several pages and automatically acquire several numbers. Only one person could use the record book at a time, and thus it was almost impossible to consult the accounts for overdue notices. Two ledgers were occasionally used, one arranged by readers' accounts and the other by call numbers, thus making book accounts. The inflexibility of this system was its chief drawback.

### 2. Dummy system

An early way of charging books in libraries with a limited number of readers was the dummy system used frequently in old Sunday school libraries. Here the borrower was represented by a wooden dummy, its sides covered by sheets of ruled paper, the name and number of the borrower on its back. When the borrower wished to draw a book, his dummy was taken from an alphabetical or numerical file. The call number and the date of issue were noted on it and it replaced the book taken from the

shelf. The volume returned supplied the call number and enabled the assistant to find the dummy. When the charge was canceled and the book returned to its place on the shelf, the dummy was again ready for use. If a book wanted was not in place, the dummy showed who had it and when it was due. The obvious disadvantage of this system was that the borrower had to wait until the whole process of discharging the book was completed. In some cases a large-sized card giving the necessary information was substituted for the wooden dummy.

### **3. Temporary slip system**

From these disadvantages developed the temporary slip system, the chief asset of which was that more than one person could charge and discharge books at the same time. A slip made when the book was charged included the borrower's name and a permanent registration number, the call number or author and title of the book, and the date of issue. When the book was returned the slip was destroyed or given the borrower as a receipt. There were three ways of arranging these slips: (1) by date, thus making the equivalent of the day book record; (2) by borrower's name or number; (3) by call number, thus creating a list of books in circulation arranged by classes. This system is still in use in libraries for books or classes of material not often circulated.

### **4. Permanent slip or card system**

The next step was a permanent card system, which differed chiefly from the temporary slip system in that each book had its own card ready for use. The book cards were larger, more durable and more uniform than temporary slips, and supplied a permanent record. Both the temporary slip and the permanent card are merely substitutes for dummies, kept together at a central desk instead of scattered through the shelves, thus concentrating records in a flexible arrangement. As the body of readers increased in

size and complexity, a method had to be devised to identify the individual. Since cards had proved to be effective for the book record, a two-card system developed: (1) a card for the book, and (2) a card for the reader, which he kept. The first readers' cards were identification cards. The incorporation of the book charges on the reader's card followed as increasing use required more complete records.

The purpose of *present-day charging systems* is to place the resources of the library, intended for circulation, at the disposal of the reader. An effective method of accounting for books not on the shelves implies a system which records the volume lent in such a way as to indicate both to the reader and librarian the date when it is due to be returned. The system must incorporate as well essential information about the borrower and the books and provide all borrowers with equal privileges. This may not mean identical privileges, but rather a liberal policy of expansion to meet needs wherever possible.

A charging system may comprise one or more of three definite records, i.e., (1) a time record; (2) a book record; (3) a reader's record. The importance of these records differs in different types of libraries. The *time record* is of primary importance in public libraries where use is relatively greater than resources, thus requiring a limited term of loan, a prompt return of books lent, and a quick follow-up of overdue books. In other types of libraries, such as college and reference, where the use is largely confined to a more limited group easily traced, the whereabouts of books may be a matter of primary importance. Under these conditions a *book record* would be essential. The fact that in libraries of this type books are often lent for indefinite periods necessitates a record which will enable the librarian to trace the volume. Under such conditions it is often equally important to be able to supply the *reader's record*, a list of all books charged to any individual. Hence book and reader's records are often found in college and reference libraries.



### 5. Browne system

In some small libraries a charging system known as the Browne system is in use. This system was devised by Nina E. Browne, formerly librarian of the Library Bureau in Boston and secretary of the A. L. A. Publishing Board. The process of registering the borrower is largely the same as has been described. Instead of the borrower's card, however, each reader has a pocket for each book drawn, which bears his registration number, name and address. When the reader wishes to take a book, the assistant removes his pocket from the file, arranged alphabetically by borrowers' names. He then takes the book card from the pocket of the book and stamps the date due, or the date of issue, on the date slip. The book is ready for the reader. The book card is inserted in the reader's pocket. At the end of the day the borrower's pocket containing the book card is filed under call number or author and title on the book card which it contains, in a tray bearing the corresponding date. This arrangement shows who has the book, when it was taken and when it is due. The reader's number may be written on the book card though this step may be regarded as unnecessary since the chances of separating the book card from the pocket are said to be slight. In returning the book, the reader must secure the pocket before he can draw another book, hence the book must be discharged and slipped while he waits.

One of the advantages claimed for this system is that no borrower's number need be copied, and another is the ease with which notices may be sent for books not returned on time. On the proper date the assistant can take all the pockets containing book cards left in the tray and without further search of records, write an overdue notice to each borrower. The disadvantages are that a separate pocket must be made for each book charged, and the file of pockets soon takes up much space. No record of the number of books charged to any borrower is available. Unless borrowers are re-registered at short intervals, the file fills up with the pockets of readers not using the library. In a dispute a reader

can never be asked for his pocket since the library is supposed to have it. In a system having branches or stations, the borrower is limited for use to the place at which he has registered. Except for very small libraries without much prospect of growth, this system would prove inadequate.

## 6. Newark system

The charging system most generally in use in public libraries today and assumed as the basis for discussion in this book is known as the Newark Charging System. This system, which keeps account of books lent by means of a single entry system based on a time record, was evolved at the Newark Public Library from similar systems which had been in use in libraries for several years. Its simplicity and elasticity make it adaptable to libraries of all sizes and easy for readers to use. Questions as to the circulation of books by the library, taking into account the readers as well, can be readily answered from the records. These queries may be: (1) What and how many books are lent on any date; and (2) Who has each volume drawn on any date; (3) What books are due on any date?

The essential records on which these and other statistics of circulation are based, are a book card, a date slip and a book pocket for each book and for each reader a borrower's card which he is usually expected to keep in his possession. Information on the book card supplies the means for tracing the volume when it is out and includes author, title, copy or accession number, and call number if the book has one. By the use of color, symbol or device, the book card may also indicate a certain type of book and the period of loan. A pocket, usually pasted in the back of the book, holds the book card when the book is in the library, and the borrower's card when the book has been charged to the reader. A date slip is pasted opposite the pocket at the back of the book. The date which indicates when the book is due to be returned or when issued is stamped on each of three records, the reader's card, the book card and the

date slip. The borrower's number is copied opposite the date on the book card. The date on the date slip indicates at once the file in which the book card is to be found, and the assistant is able to discharge the book and release the borrower immediately on the return of the volume.

The advantages of the Newark system over other systems for public library use are: (1) the speed possible for the assistant to acquire, especially in discharging books; (2) the permanent record of use on each book card; (3) the use of the borrower's card at any point in the system; (4) the ease of fixing varying periods of loan for which books may be drawn; (5) the possibility of expansion to meet special local needs. The disadvantages lie in (1) the danger of mistakes in copying borrowers' numbers; (2) the difficulties caused by the borrower's failure to bring his card when books are to be drawn or returned, and (3) the loss of borrowers' cards. As a result of these difficulties, libraries have introduced into their routines modifications to suit local conditions which are still largely experimental. Some of these variations have already been mentioned in Chapter 3.

(a) *No reader's card.* In some very small systems the reader's card is omitted altogether. The registration cards filed alphabetically must be kept close at hand and consulted for the borrower's number each time a book is lent. Registration records when used for this purpose may be filed vertically to save space. There are disadvantages: (1) to the reader having to wait to learn his number, and (2) to the assistant having to ask the reader's name repeatedly.

(b) *Identification card.* In some systems the effort to obviate these disadvantages has resulted in the issue of an identification card to the reader, giving his name, address and registration number. Books are charged to this number on presentation of the card. This method simplifies charging and discharging by eliminating the stamping of the date on borrowers' cards. However, the borrower has no record of the number of books drawn and no receipt

for books returned, nor has the library any method of knowing or limiting the total number of books taken by the borrower. It is difficult to curtail the reader's use of the library even though he has many books overdue if he presents his identification card each time he draws books.

(c) *Period of loan.* Since the period of loan of the book and the date of its return are of such importance, the best method of indicating when a book is due has never been finally established. This question involves the convenience of the borrower and the effectiveness of records, the speed of charge and discharge, and the expeditious return of books to the shelves. New and popular fiction is often given out for seven days without the privilege of renewal. Current or recent magazines also are often lent for a short period, because they are in demand and soon replaced by later issues. Most non-fiction and older fiction is charged for fourteen or twenty-eight days. With these variations in the period of the loan, it is necessary to indicate to the assistant how long each book may be kept. This is most commonly accomplished by the color of the date slip or a statement printed on it. In the actual charging it is accomplished by the use of rubber stamps showing the date involved in the transaction. These stamps may be of any size or shape, and may incorporate any information or symbol needed. The date for which they are set involves a question of library procedure often discussed at meetings of librarians and argued by heated partisans seeing the advantages in their own way of doing things.

The question is: (1) Shall a book be stamped to show the date that it is due? or, (2) Shall it be stamped with the date of issue, requiring the reader to compute when it is due?

When a book is stamped with the *date due*, the assistant ascertains from the date slip the period for which the book may be taken out and stamps all the necessary records to correspond to the period of loan. The advantages of this system to the borrower are obvious. Without any effort on his part he knows at once when every

book in his possession is due. The advantages to the staff are that great speed is possible in discharging books; that it is easy to compute fines for books overdue and to renew books.

A disadvantage of this system arises from the possible confusion of stamps needed in charging different classes of books given out for varying periods of time, and the resulting inaccuracies. In many libraries each assistant signs a symbol on the book card preceding or following the borrower's number to show his responsibility for the charge. In the date due system this symbol must be written for every book charged. It is impossible for every assistant to have his own set of stamps. Also book cards for books given out for varying periods must be sorted for filing under date due.

When books are stamped with the *date of issue*, the mechanical advantages seem obvious. One stamp answers all purposes in charging and discharging and removes all possibility of confusing stamps and marking book records with incorrect dates. Each assistant may have his own stamp with a symbol incorporated in it. All book cards for books charged in one day are filed back of the date guide for that day. Since charges for varying lengths of time are filed together, the period of loan must be indicated by various devices, or by differences in the color of book cards. This is particularly desirable in the case of book cards for books lent for a short period, which become overdue before those charged for a longer time.

A disadvantage of the system arises from the reader's difficulties in discovering when books are due. Since all books are stamped with the date of issue, the borrower must note the period for which each is drawn. He must then ascertain the date when the book is due, seven, fourteen, or twenty-eight days hence. Computing the dates of overdue books and the fines due, though difficult, may be simplified by mechanical means and the staff may readily become expert in solving these problems.

Both systems thus have obvious advantages and disadvantages. Both systems are successfully used in libraries of varying sizes

and types. Both systems present opportunities for adaptation to local needs. The size of the circulation of the library may conceivably be the governing factor in the choice. In large libraries, the stamp set for each assistant and the placing of the responsibility on readers for computing dates due are labor and time-saving devices of such importance that the date of issue is commonly adopted. Smaller libraries may allow the convenience of the borrower to be the primary consideration and stamp books with the date due.

## II. CHARGING BOOKS

In describing the details of the charging and discharging of books by the Newark system, it is necessary to presuppose that the books have been properly cataloged and prepared for use, and that the borrower has been assisted through the preliminary steps and is ready to take the book he wishes.

### 1. **Setting date stamps**

Date stamps most commonly in use are band daters, set by turning a small thumb screw, and those daters which fit over the end of a pencil set with loose rubber type, which must be kept in order in boxes. If stamps set for several dates are needed at one desk, the period of loan may be indicated by the form of the stamps; by the composition of type; by colored pencils inserted in daters; or by the use of small labels. By the introduction of symbols into the loose type daters, it is possible to indicate varying periods of loan in the date due system, and when date of issue is used, to identify the assistant making the charge.

The number of date stamps required will be determined by the system in use in the library and by the varying periods of time for which books are lent. When books are stamped for date due, it will be necessary to set a fourteen-day, seven-day and twenty-eight day stamp, after determining the dates from a calendar. In large libraries more than one of each may be set, depending on the

number of assistants on duty at the busiest hours of the day. It is usual to see that books do not fall due on Sunday or on legal holidays, though the library may be open on these days. A return stamp to discharge books must be set with the current date.

In systems using date of issue it is necessary to set stamps with only the current date for both charging and discharging.

Date stamps may be set by one member of the staff for the whole staff or by the individual assistant for his own use, or by pages. It is usual to set these stamps at the end or beginning of the day and to have them verified by an assistant definitely assigned to this duty, or by someone who has not set them. The physical condition of these stamps and the stamp pads used with them must be regularly inspected. Clean, clear-cut dates save difficulties and misunderstandings between public and staff and expedite the discharge of books.

## **2. Checking borrower's card**

With the desk thus equipped, the assistant is ready to proceed to charge books presented by the borrower with his borrower's card. This card must be quickly inspected by the assistant, who notes the date of expiration and looks for uncanceled charges. If the card has expired, the borrower is asked to re-register. If uncanceled charges for overdue books appear, some adjustment must usually be made before other books are charged on the card. If a limited number of short term books is lent, the card must be checked to see that no more than the proper number is charged.

Certain variations in this procedure occur in libraries not using borrowers' cards. In systems using identification cards, the borrower presents his card to show the assistant his borrower's number and to prove that he has registered and is entitled to draw books. No record of charge is stamped on these cards and the number or classes of books drawn are not limited. In small libraries in which no borrower's card is used, the assistant ascertains the name of the borrower and consults the alphabetical file to secure the number to

which books are to be charged. In systems following these practices with resident adults, borrowers' cards are still usually required for children, intermediate, and non-resident borrowers.

### 3. Checking book records

In many libraries the information on the book card and pocket are hastily compared by the assistant preparing to charge a book, to see that the same accession, or copy, or call number appears on both records. This is not necessary in libraries where the slipping of books has been verified before shelving. By slipping is meant that process following the discharge in which the book card for an individual book is withdrawn from the place where it is filed under date and returned to the pocket of the book.

### 4. Making the charge

In a system charging books with *date due*, the assistant sees at a glance the length of time the book may be kept, from the color of the date slip, or a label appearing in a prominent place, or a symbol on the book card. With the correct stamp the date due is marked on the date slip, the book card, and the borrower's card, below the last date previously entered. The borrower's registration number is then invariably copied on the book card, usually following the assistant's initial or symbol.

A further check considered necessary in some libraries is secured by copying the borrower's number a second time as a whole or in part under the date stamped on the date slip. As a result the assistant can be sure of canceling the right charge when the book is returned, and the slipping of the book can be double checked. It is a question whether these double checks do not consume an undue amount of time at a busy desk, and whether the mistakes so caught could not otherwise be detected in less time and with less duplication of effort.



Speed and accuracy are tremendously important in this transaction, for many and disastrous are the mistakes that can be made here, and their consequences may be far-reaching. Few complications arise in charging any single book. But when a borrower presents several borrowers' cards and an armful of books of various sizes and classes to be charged for varying periods of time, and when the line of borrowers waiting to have similar assortments charged seems unending, the assistant needs ingenuity in devising quick ways of sorting and arranging books and cards for stamping. Perhaps the assistant opens each book in succession and sorts them by period of loan to distribute them among the borrowers' cards according to rules. Then he draws out the book cards, making the necessary comparisons in the flash of an eye, stamps all the date slips calling for the same date, one after another, and closes each book. Then all the book cards may be stamped and then the borrower's card, in the column under the heading "Date due," once for each book requiring the same stamp. At this point the next stamp needed is chosen, the process repeated, and the books pushed aside. When the stamping is completed, the borrower's number may be copied on one book card, the borrower's card slipped into the pocket of the top book, and while the borrower is gathering up the books and moving away to make room for the next borrower, the number and symbol will have been entered on each book card.

In libraries limiting the number of books of fiction allowed, *the position of the stamp on the borrower's card* may be made to differentiate between charges, non-fiction being stamped in one column and fiction in another; or a pencilled check or initial may be used as a symbol. This method is useful in charging new books and magazines when the number to be drawn is limited. Also in most libraries rental or special privilege books are usually clearly marked on the borrower's card in such a manner that the staff recognizes them at once. When the charge is complete, the borrower's card is put in the book pocket.

There is no one accepted way for doing this work most successfully.<sup>1</sup> Each person should discover the quickest safe way, develop a habit and follow it automatically. Ingenuity suggests combinations which save motions and yet do not risk accuracy.

When *date of issue* is used in the system, there is very little variation in the process. The assistant makes the same motions and accomplishes the same results. The stamping of dates may be accomplished a little more quickly since only one stamp is used for all charges and no concern need be given the period of loan. Further, no symbol need be written as this may be incorporated in the stamp. The current date is stamped on each date slip and book card for every book or magazine going out, and the borrower's card is stamped once for each item drawn. The borrower's number is copied as before. It is the borrower's responsibility to determine when the books are due.

### III. FILING BOOK CARDS

Effective work at circulation desks is largely dependent on the convenient location and arrangement of the files of book cards. Hence there is almost no uniformity in practice. The plan and size of the library where the work is done may govern to a large extent routines of performance. Four definite steps are usually followed in filing book cards. These are: (1) preliminary sorting; (2) temporary arrangement; (3) count; (4) permanent filing.

<sup>1</sup>For many years librarians have been working toward a machine which could be used to perform many of the routine clerical duties connected with charging and discharging books. Quite recently such a machine in its later experimental stages has been shown, and it seems to meet requirements, yet to be simple and easily worked. The obvious advantages are the result of the speed of charging, and its mechanical accuracy. Its disadvantages are those accruing from its mechanical characteristics and peculiarities. Certainly it is a hopeful sign of progress toward a day when the routine clerical work of charging books will be accomplished by clerks using machines, and thus qualified assistants may be released for the personal service which is of so much greater importance.

### 1. **Sorting**

When there is a rush of work at a charging desk, the book cards are usually dropped through a slot into a drawer below for later handling. The first rough *sorting* may be done at this desk at dull times by separating fiction from non-fiction book cards. Seven-day book cards and other short term charges, such as magazines, may likewise be separately filed as are the book cards for foreign books. Such sorting is eliminated in some libraries, the book cards being merely collected at the charging desks and left to be handled at a later time.

### 2. **Temporary arrangement**

In either case the book cards for the day must be arranged in order prior to transfer to the permanent files. Book cards for fiction are usually arranged alphabetically, first by author's name, and second, by the titles of books, and further by accession or copy numbers if more than one copy of a title has been charged. Those for non-fiction are usually arranged by call numbers in class order. Book cards for short term loans may be arranged separately. Movable trays in which book cards can be arranged after sorting suggest another convenient way of keeping the day's circulation records in order, at the various points where books are charged. If books for all borrowers are charged and discharged at the same desk, it is common practice to separate book cards for juvenile books from adult book cards for the purpose of securing statistics of use. As a rule all work with children and the statistics relating to it are separated from work with adults.

### 3. **Count**

At the end of the day, or the next morning, all of the book cards are assembled from the various charging desks and thrown into one file for counting. (See Chapter 11, p. 242.)

#### 4. Permanent filing

(a) *Date due.* Since the key to the whole charging system consists in filing each book card under the date when the book represented is due, the bulk of each day's charges, i.e., all but the short term loans, is filed as a unit behind a new date guide added after the tray holding the book cards charged on the preceding day. Room is made for the new tray by shifting the book cards in previous trays, depleted by withdrawal of book cards as books are returned, thus making the whole file more compact. Short term loans must next be filed by author or call number, in the trays bearing dates corresponding to those last stamped on the book cards. The dates are clearly marked on date guides in the files, and alphabetical guides are also freely scattered through the trays to aid in search.

The arrangement of cards in these trays is largely a matter of local practice and individual convenience. For example, the advantages of any one arrangement for filing the cards for magazines are difficult to determine. Shall they be filed all separately or at the end of the seven-day file? Where it is possible to slip magazines at a point away from the files where books are slipped, time may be saved by using separate trays in which magazine book cards are arranged under date, first in alphabetical order and then by copy number. Rental book cards are also often filed separately.

(b) *Date of issue.* In the filing of book cards in a system where books and records are stamped with the date of issue, the preliminary processes of sorting, arranging and counting are identical with those described above. The basic difference appears in that all the book cards for each day are filed together. Short term loans must be indicated by various devices, colored book cards being frequently used.

### IV. DISCHARGING BOOKS

For the convenience of the borrower, many libraries charge and discharge books at different desks. The discharging of books

involves (1) the release of the borrower from responsibility for the volume returned, (2) the return of the book to the shelves with as little delay as possible. When book cards for adult and juvenile books are filed at separate desks, these books must be returned to their respective points.

Even with so definite a process as the discharge of books, an entire lack of uniformity in practice is indicated. Some libraries use different colored inks for charging and discharging; other libraries place any stamp opposite the date due or through the date of charge; and others cancel the charge with a bar stamp without any date. Many libraries justifiably feel that the date of return is an important part of the borrower's record and use only a stamp bearing the current date.

In libraries where the *date due* is stamped on records, a special return stamp bearing the current date is needed to discharge books. This date is stamped in the column headed "Returned" opposite the date due stamped when the reader's book was charged. This cancels the charge.

When the library indicates the *date of issue* in charging books, the same stamp is used in discharging. A slip is usually kept at discharge desks showing the dates appearing on date slips for books charged twenty-eight, fourteen, or seven days previously. This catches overdues at once and saves time and nerves.

The assistant at the discharge desk receives the book from the borrower, takes the borrower's card from the pocket, and compares the last date on the date slip and the date on the borrower's card. If the registration number has been copied on the date slip as well as the book card, the latter is withdrawn and these numbers are also compared before discharging the book, to assure the assistant that the correct book is being discharged from the proper borrower's card. The condition of the book should be quickly inspected to see that it shows no signs of ill-usage.<sup>1</sup>

In libraries using no borrower's card or identification card,

<sup>1</sup>For damage to books, see Chapter 6.

comparisons of dates are impossible. The return of the book and the slipping of it are the only records of cancelation.

### **1. Canceling regular charge**

If the dates correspond and the book shows no damage, the assistant stamps with the proper stamp in the column marked "Date returned," opposite the date indicating the charge. The borrower's card is returned to the reader, or on request it may be filed at the desk as previously explained in the preceding chapter. The book is then placed where it can be slipped.

### **2. Receipt for book returned without card**

An attempt is often made to discourage the return of books without borrowers' cards since these deviations require additional records. When this occurs, however, a receipt must be given the borrower for the return of the book. A special form or slip incorporating the necessary information is issued by some libraries to be returned with the borrower's card to cancel the charge. This practice, however, is being largely discontinued as borrowers so often lose receipts or fail to return them. Many libraries file them in the same way as borrowers' cards. These receipts need give only enough accurate information to enable the assistant to cancel the charge for a book when the book is not at hand. This usually includes the date due, or the date of return, call number for non-fiction, author and title for fiction, borrower's number, or name and address, or sometimes both. If the book is overdue, a note of the amount of the unpaid fine should be entered, preferably in ink to prevent erasure. In some libraries the receipt takes the form of a temporary borrower's card on which a limited number of books may be drawn. By thus incorporating two records, this card saves duplication and creates in the mind of the borrower an impression of the library's willingness to meet an emergency. This card may be kept on file though most libraries discourage the reader in no uncertain terms from coming too often without a borrower's card.

No..... Good Until.....		
Signature.....		
Address .....		
Book	Due	Returned
Fine.....		
Paid .....		
Card reported lost.....		

COMBINED BORROWER'S TEMPORARY CARD AND RECEIPT.—  
May be used for a definitely limited time (1) when borrower has forgotten card, (2) when borrower reports card lost, and (3) as a receipt when borrower returns books without card.

The charge for which a receipt has been issued must be canceled when the borrower's card is brought to the library. This is done by comparing the dates on the receipt with the charge on the card and by stamping off the charge with the return stamp. The receipt is usually destroyed, although if it is also the temporary card suggested above, it may be filed for future use, when it has been marked to indicate the cancellation of the original charge on the borrower's card.

### 3. Canceling overdue charge

It is customary for the library to charge a fine for books kept longer than the rules permit. An attempt is thus made to discourage the borrower from keeping books overtime because the machinery of securing the return of these books is complicated and requires time of the staff that might be used to better advantage.<sup>1</sup>

In canceling the charges for overdue books, the assistant discharges the book, counts the number of days for which fines are due, and computes the amount of the fine which the borrower is expected to pay at once. If sufficiently overdue for a notice to have been sent, the book is usually slipped while the borrower waits. Upon payment of the fine, the borrower's card is returned to him, or filed, according to library practice. If the fine is not paid, the amount is entered on the borrower's card and the borrower may be permitted to use the card once if a small sum is due. Or the card may be filed at the library until the fine is paid.

### 4. Slipping books

In order to complete the process of discharge, the book card must be withdrawn from the file where it has been while the book is out, and returned to the book pocket. The assistant notes the date on the date slip, finds the proper file in the trays, and searches for the book card by the author and title, if fiction, or by the call number if non-fiction. When found, this is withdrawn and the various comparisons required by local practice are made. Accession numbers or copy numbers, call numbers for non-fiction, and borrowers' registration numbers, when copied on the date slips and the book cards, are compared in various combinations in different libraries.

The assistant also watches for symbols indicating variations in the use of the book. Thus when a book is to be held for reserve,<sup>2</sup>

<sup>1</sup>For full discussion of this, see Chapter 6.

<sup>2</sup>See Chapter 5.



some signal or symbol is attached to the book card in the trays. The person finding this book card must set the book aside so that the proper notices can be sent to the borrower wanting it. It is also customary for the assistant to watch for filled book cards and date slips and to place these books where the necessary new records will be inserted. When the book has been properly slipped, it is put aside for return to the shelves.<sup>1</sup>

Every possible effort is made by the assistant slipping books to work accurately and quickly. A book card inserted in the pocket of the wrong book immediately complicates the use of two books; (1) the book to which the book card belongs is left with no book card to be found for it; (2) the book card for the volume which is slipped incorrectly remains in the trays as if the book had not been returned, although the volume may be on the shelf or perhaps circulating on the wrong book card.

*Lost or misplaced book cards.* When the book card cannot be found, the volume is set aside for special search later, which often involves much ingenuity on the part of assistants. The handling of snags, as these problems are generally termed, is almost always a matter of local procedure. Since the effort of the library is to avoid withdrawing books from circulation without real reason, many methods have been devised for circulating books temporarily without book cards. A procedure used successfully in one library is as follows: Books for which book cards have not been found after a thorough search of the trays are usually kept in a special place at or near the slipping desk for a month. At least once a week the shelves and trays are carefully searched. If the book cards are not found by the end of the month, two duplicates are made, each of different color. One color represents the duplicate book card for use in the book, the other represents the book card to be filed in what is called the snag file. If the original book card is found while the book is in circulation, it is attached to the book card in the snag file. When the book is returned, the tempo-

<sup>1</sup>For full discussion of shelving which follows slipping of books, see Chapter 10.

rary colored book card is found in the trays and the snag file is searched to see if the original book card has been found. If so, it is returned to the book, which goes forward normally. If not, the book is allowed to circulate for three months on the temporary colored book card, and then a permanent duplicate book card is made. Other less accurate and methodical practices obtain in many libraries, books being circulated on temporary book cards or withdrawn from circulation for what may be too long a time.

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### THOUGHT QUESTIONS

1. Give four characteristics of a good charging system, arranging them in order of importance. Give reasons for your answer.
2. In a library using the Newark charging system and stamping books with the date due, how could you ascertain:
  - (a) When the only copy of Wells' *Outline of history* is due to be returned?
  - (b) What is the name and address of the borrower to whom it is charged?
3. Compare the book records of the modified Newark and the Browne charging systems, described in the text, in point of (a) convenience to the public and the staff; (b) speed; and (c) accuracy.
4. What differences in the methods of charging books occur in a system circulating 50,000 volumes a year and a system issuing ten times that many books?
5. Assume a borrower to have declared he has no books out even though there is an uncanceled charge on his card. Outline the procedure the assistant will go through, (a) to disprove the borrower's claim, and (b) to prove the claim.
6. Discuss the relative merits of charging books by stamping (1) the date due, and (2) the date of issue:
  - (a) in a small library,
  - (b) in a medium-sized library,
  - (c) in a large library.
7. If a borrower disputes a fine, just how would you, as assistant, handle the situation?
8. What additional records must be made when a borrower returns

his book without a borrower's card? What steps would you take to discourage this habit?

9. With what steps in charging and discharging books can the assistant become so thoroughly familiar that he can perform them with speed and accuracy while giving full attention to the borrower?
10. Outline a charging system for a public library having 3,000 registered borrowers.
11. List the items of equipment necessary for the system outlined in 10.
12. Draw a plan for a circulation file to be used in the system outlined in 10.
13. What would you do if a reader returned an overdue book and the book card could not be found?
14. Describe any efficient short-cut methods of charging and discharging books of which you know.

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## CHAPTER 5

### Borrowers' Privileges and Related Services

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|--|---|
| I. REGULATING BOOK PRIVILEGES                        | 2. Transferring charge for books                |
| 1. Adult borrowers                                   | 3. Reserving books                              |
| 2. Juvenile borrowers                                | 4. Renting books                                |
| 3. Special services for special classes of borrowers | 5. Charging material other than books           |
| II. REGULATING TIME PRIVILEGES                       | 6. Charging books to staff and trustees         |
| 1. Hours of Service                                  | 7. Return of books to any point of distribution |
| 2. Period of loan                                    | 8. Restricted books                             |
| 3. Vacation privileges                               | 9. Quarantined books                            |
| III. RELATED SERVICES                                | 10. Inter-library use of borrowers' cards       |
| 1. Renewals  |   |
- 

Restrictions are of necessity determined by the library's resources. The size of the collection and the staff and the relation of both to the community are the governing factors in determining the borrower's privileges. Rules are made to distribute opportunities equally and if liberally interpreted the borrower will focus attention on the privileges granted by the library rather than the restrictions necessarily imposed. The borrower may thus be made an active cooperator in maintaining a system planned to give each reader as many privileges as the size of the collection permits. He can be encouraged to live willingly within such bounds as the library must define if he believes that a rule is not a process cleverly devised to hamper the individual and keep him from having what he wants.

Many readers fail to think through to the reasons behind the limitations imposed on certain classes of popular books, such as

new fiction and new magazines. Only the fact that a choice must often be made between equally desirable titles strikes the reader. A librarian, enforcing this type of rule, may call attention to the protection it provides all borrowers. The idea may be conveyed that if the rule had not been in force, some other reader, arriving earlier in the day, probably would have taken away the coveted titles under discussion and thus have deprived all who came later of any possibility of choice. The manner of the circulation assistant can do much to convey the idea that the object of a rule is never to curtail the borrower's legitimate privileges.

As important as are uniformity in procedure and interpretation of privileges, liberality at times takes precedence over both. Exceptions to rules cannot be left to the judgment of the circulation assistant, but must be plainly stated by those in authority to whom the assistant should turn in order to place responsibility. As an example, when a new branch in a system, opened in an outlying district, is fully equipped with books assembled to meet normal growth, the community may be slow to avail itself of its opportunity. Why limit the borrower wishing to take from the full shelves more than the usual allowance of attractive titles when enough books are left to satisfy other readers? Use and demand will soon require limitations but where possible the library should meet the individual's needs. If the situation is explained to the borrower, he will usually appreciate the generosity and agree to carry out the letter of the law when it becomes necessary to do so. A fair basis for procedure allows *a liberal interpretation of rules for the benefit of an individual, if as a result other individuals are not deprived of their rights.*

## I. REGULATING BOOK PRIVILEGES

The practical application of these theories suggests three questions: (1) How many books may be allowed an adult borrower? (2) How many allowed to a juvenile borrower? (3) What special services are given to certain classes of borrowers?

### **1. Adult borrowers**

The period of years is short since one volume each of fiction and non-fiction was considered a fair and liberal portion for a borrower. Present policies show the rapid strides that have been made in spreading the usefulness of the library. A reasonable number of books, fiction or non-fiction, is usually allowed on any borrower's card. Public libraries of all sizes rarely limit the number of books a borrower may take except in the case of popular, new titles and new magazines. Fairness requires that one borrower or group shall not be permitted to deplete the shelves on any given subject. Such a course is liberal and just and leaves the decision in the hands of the assistant, who can watch demand and supply and regulate privileges accordingly.

### **2. Juvenile borrowers**

Procedure differs as to children's privileges in most libraries. A definite limit is established, often one volume of fiction and one of non-fiction, or in some cases any two books are allowed. This measure is adopted to encourage the right variety in the child's reading, as well as to cultivate habits of thoroughness. If allowed only two books, the child is likely to read them carefully and not skim them hastily. Furthermore, it is well to cultivate early in the child's mind a sense of personal responsibility for books he has drawn from the library, which is easier to do when a limited number is allowed.

### **3. Special services for special classes of borrowers**

In determining those borrowers who are entitled to special privileges, libraries often choose to favor classes or individuals active in guiding other groups and in influencing thought. Teachers, students and research workers, the clergy and leaders of all sorts are generally regarded as entitled to this consideration.

(a) *Teachers, students and clergy.* Teachers often receive special duplicate borrowers' cards to be used in drawing books and material in connection with their work. Many libraries impose practically no limit on the number of books which may be drawn on such cards, and liberal extensions of time are granted, governed primarily by the teacher's need, the size of the collection, and the demand. In larger libraries these cards are used chiefly in teachers' special collections and children's rooms, and may be kept on file there. The charge often incorporates the accession or copy numbers for the titles drawn, as an aid in tracing when renewal is granted, and in discharging proper items upon their return. A special card similar to the teacher's card may also be given the clergy, students and research workers, or the fact that special privileges as to the number of books and length of charge have been granted may be indicated on the individual borrower's card by the introduction of a symbol.

(b) *Mail-order loans.* Books will be sent to *local* or *non-resident borrowers* in some systems by parcel post or express, at the expense of the borrower for transportation. The charters of other libraries restrict the mailing of books. When this service is granted it may expedite the delivery of reserved books, and will probably be used chiefly by very busy people who need a book badly, or by those who, because of illness or physical handicap, are confined to their homes. In case of emergency a special delivery stamp will bring a book within a few hours to a reader who asks for it by telephone. Libraries often accept, especially from non-resident borrowers, a small deposit for postage. Or, if this is not the practice, the postage due may be entered on the borrower's card if this is on file at the library; or, an additional card may be inserted in the pocket asking the reader to pay the outgoing postage when the book is discharged; or, if returned by mail, to enclose the fee. No charge is made for this service, which often brings the library into touch with groups in outlying dis-



tricts where people needing books appreciate keenly this generous service.

(c) *Blind readers.* Through its service to blind readers, a library establishes particularly liberal and far-reaching connections. Many efforts have been made to find a simple, compact, and easily legible type for the blind. Hence, nearly all the collections in libraries have books in Line letter, New York point, Moon-type and the various types of Braille. Readers are not always able to read all types, hence the choice of books for the blind should be checked for the type in which they have been published as well as for the contents desired by the reader. Active cooperation is widely maintained between libraries with departments for blind readers and the agencies engaged in teaching children and adult blind to read. Special privileges as to the length of the loan and renewal are almost always allowed, since reading these books is a slow process. Blind borrowers are frequently not required to register but may have books charged to name and address.

Because of the method of printing, books for the blind are usually large and unwieldy and difficult to carry. When printed for the blind reader, the usual volume of fiction which can be tucked into a pocket or carried under the borrower's arm, makes several thick volumes. This fact, coupled with the difficulties experienced by the blind in going to libraries for books, has led those interested to arrange for a unique service on the part of the federal government. The United States mail will deliver to any blind reader any book or books plainly marked, free of postage cost. Libraries are granted franks, which cover mailing to the borrower and the return to the library of these particular books. Sacks or boxes of uniform size are used for mailing. Libraries usually place no limit on the area in which these books will be distributed. Any blind reader communicating with any library lending such books can secure its lists and its simple rules for lending, and have the books delivered and called for without effort.

## II. REGULATING TIME PRIVILEGES

## 1. Hours of service

9 A. M. to 9 P. M. are the hours commonly chosen for the circulation of books at the main library. Children's rooms often close at six o'clock or open later than the adult departments. Since a branch is conducted with a relatively small staff, it is in some cases closed in the morning when it would be least used. Very small libraries or branches are sometimes opened for a few hours a day on regular days, or on alternate afternoons and evenings. During the summer some libraries alter their hours of opening because of the decrease in use.

(a) *Sunday use* of the public library is generally accepted. Many library systems open public departments in the main library for reading and reference during the afternoon and possibly the evening, on the theory that library facilities should be available for the public, whether or not books are circulated. In some systems, the circulation department carries on all its regular activities.

(b) *Holiday use* of the library presents no variation in the service so far as the public is concerned. Most libraries close entirely on Christmas Day and the Fourth of July though other holidays may not be observed. Many and various are the arrangements necessary to man the desks of the public departments where the work goes forward as usual. Volunteers from the staff may be assigned to duty or the staff members may be scheduled to work a certain number of Sundays and holidays. As a rule borrowers are not required to return books on holidays. Many people employed during the week are found in the library on Sundays and holidays and valuable assistance can be given to them and to other readers whose opportunities for use are limited.

## 2. Period of loan

When the library is organized certain definite periods for which books will be lent are determined. The periods of loan

will be determined by the resources of the library compared to its use. Various exceptions are made to the regular period of loan in the case of new books or other special material which it is necessary to have returned quickly. In such cases shorter terms of loan are arranged. At this time many librarians are experimenting to determine whether a more effective service is provided if books are charged as is commonly the practice, for *fourteen days* with the privilege of renewal, or for *twenty-eight days* without renewal. The debatable points involve three topics: (1) renewals, (2) book supply, (3) book losses.

It is generally admitted that *renewals* practically disappear when books are charged for twenty-eight days, being granted under these circumstances only in case of emergency. Thus the library reduces the chance of error in recharging and saves much time and clerical work.

The *book supply* is an important factor in determining the period of loan. It can be seen that the long term loan tends to drain the collection since books may be kept out unnecessarily for the full time allowed. In large collections where many duplicates are provided, this difficulty may not be serious, but in smaller libraries of more limited means, real hardships may result, particularly in the turnover of the newer titles. Many efforts are made to secure the prompt return of books through cooperation of readers. Slips or labels are inserted in popular books, or volumes in great demand are charged for less than the regular period of loan, i. e., seven or fourteen days. Though the public undoubtedly likes the privilege of reading in a leisurely way with time, perhaps, to digest the book, yet the same readers may also dislike having to wait unduly for another borrower who may be enjoying the same privilege. This argument for the shorter term regular loan suggests also the fact that by this arrangement more readers are served, since people have to come to the library more frequently. The long term loan is also claimed to reduce the number of first notices sent for overdue books.

The question of *book losses* depends largely on the character of the community in which the library is located. With a shifting population, a public library charging books for twenty-eight days may in some instances lose more than if the books were charged for fourteen days and promptly followed up if not returned. Some librarians, however, feel that there is no difference in losses.

To summarize, it seems demonstrable that with the same staff and the same service to the public, the time spent on renewals can be more profitably devoted to aiding readers. But this advantage for the long term loan must be weighed against the slower turnover of books among readers. In other words, each library must survey its resources and its community needs and determine the fair period for which to issue its various classes of books. It may even be possible to experiment with both periods of loan and compare actual results to achieve an accurate basis for a decision.

### 3. *Vacation privileges*

The circulation and use of books and libraries is heaviest during the winter when schools, classes and clubs are in session, and the majority of people are seriously engaged in some pursuit. During these months the resources of the library are heavily taxed and special privileges require careful regulation. Privileges customarily granted to selected groups are often quietly but discreetly discouraged during the busy season. But when the varied indoor activities of the winter months, involving the use of books, are replaced by outdoor activities, when schools close and clubs meet no more, the use of the library flags. Books which have been in constant demand stand idle in their places on the shelves. In order to stimulate reading during the summer, public libraries allow their borrowers certain vacation or summer privileges. By this plan all but new and short term books can be charged from June 1 for a period varying from three to four months. A liberal number of such books may be drawn, with certain reservations clearly stated to the borrower. The reader understands that no

one is permitted to deplete the shelves on any subject and that if a sufficiently urgent demand comes for any title borrowed under this arrangement, he may be asked to return it after a reasonable time. It is, therefore, necessary for the library to have the borrower's forwarding address, a rough record of which may be kept on cards alphabetized under the borrower's name in a special file, or in the registration file. The reader's advantage in this type of service is evident. The advantages to the library consist in (1) having in use books which might otherwise stand idle for months, and (2) relieving congestion on the shelves.

### III. RELATED SERVICES

#### 1. Renewals

A consideration of the tendency to lengthen the period of loan shows vividly the steadily developing recognition of the social function of the library. People as well as books must be considered in determining policies. Hence, many librarians feel that their ideals of service can be more nearly achieved if there is no unnecessary limit to the number of books drawn, and the period of loan is as long as reasonable. Renewals are practically always granted when requested except in the case of short term loans or regular long term loans. Some libraries do not renew books which have been reserved and make a point of calling the borrower's attention to this fact when he draws the book, or of notifying him when he requests renewals.

Two types of renewals are commonly granted in most circulation departments: (a) automatic renewals requested at the time of charging the book to the borrower, (b) renewal by special request later, usually when the book is due to be returned.

(a) *Automatic renewal.* A request for renewal is incorporated in the original charge in some libraries, using two weeks as the regular period of loan. This is a convenience for the reader, a privilege extended only by *special request* which may be indicated

by a symbol in the charge, often "Ren" pencilled below the borrower's number. The assistant finding this request among overdue book cards renews the charge by filing the book card in the proper place, which may be fourteen days ahead of the first date due. Or, it may be inserted in a special file of renewals.

A request for extension of time may also be indicated by using both fourteen and twenty-eight-day stamps in making the original charge. The book card and the date slip are stamped with the fourteen-day stamp and then both of these records and the borrower's card are stamped with the twenty-eight day stamp. The borrower's number is copied and the book card is filed regularly under the fourteen-day date. If the book has not been returned when it first falls due, the book card is then transferred to the file under the twenty-eight day date. This amounts to an automatic renewal. It saves time and effort for the *borrower who requests renewal* when he takes the book, and for the library staff since the twenty-eight day stamp gives the *actual date due*, fourteen days ahead of the original date due, thus avoiding the need of setting another stamp to make renewals, and of figuring the date due for books to be renewed when they appear in the files of overdues.

(b) *Renewal by special request.* The more usual type of renewal is that granted when borrowers request that books be renewed as they fall due. Libraries ask only such information as will facilitate the tracing of the book card, that is, the date due (or date of issue); author and title of the book if fiction; call number if non-fiction; and the borrower's card number. Books may be renewed on request in three ways: (1) with the book and the borrower's card; (2) without the book; (3) without the book or the borrower's card, i. e., by personal request, telephone or mail.

(1) *Renewal with book and card.* When both the book and the borrower's card are presented, the book card is removed from the circulation file, the charge on the borrower's card is canceled,

and the three records are stamped as for a new charge. In some cases the borrower's number is dittoed on the book card; in others a straight line is drawn after the new date under the borrower's number to indicate "Repeat." Or, the symbol "Ren" with or without the borrower's number may show the renewal. The book card is then ready for filing as described below.

(2) *Renewal without book.* When the reader presents only his borrower's card with a request for renewal, some libraries decline to renew the book. If, however, the reader's convenience is the first consideration and renewal is allowed, the book card must be traced, the charge on the borrower's card canceled and the book immediately recharged under the new date due (or the date of renewal) on both borrower's card and book card. Or, the charge may be renewed by writing "Ren" after the date on the borrower's card instead of stamping it again.

Only one step appears as invariable and essential in the varied procedures developed for renewing a book, namely, the book card must be withdrawn from its original place in the circulation file and must be so marked and refiled that the book it represents will not appear to be overdue. There are three common ways for *filing book cards for renewed books*: (1) in a special renewal file; (2) under the new date due, or date of renewal, with other charges for that day, with a reference from the original date; (3) under the original date. The first method seems to possess distinct advantages. In this file are assembled all renewed book cards, regardless of dates. Fiction is arranged by author and title, non-fiction by class number. The segregation of these cards makes possible separate statistics of renewals, if such are kept. If the borrower returning the book states that it has been renewed, only the renewal file need be searched. This method also saves the scattered search often necessary when the book card has been removed from the file indicated by the last date on the date slip.

If, however, the renewals are filed with other book cards under the new date, some indication must appear in the file from which

the book card bearing the original charge is withdrawn, in order to trace it from the date appearing on the date slip. A rough temporary slip for each book renewed is filed under the original date. This incorporates only essential information and shows the date under which the book card can be found. Hence it serves as a link between the date slip, which bears no record of the renewal, and the book card in the file. The third method, that of filing under the original date, has the questionable advantage of holding the book card in a file under the date corresponding to that last appearing on the date slip.

Many libraries require that renewed books be slipped before the borrower leaves in order to complete the transaction before canceling the charge. If the book was overdue when renewed, the record of fine due has been made on the temporary slip or the book card and this can be collected when the book is returned. Or, if the borrower has failed to renew the volume, questions can be easily settled at the time of return.

(3) *Renewal without book or borrower's card.* The reader wishing to renew a book with neither book nor borrower's card at the library may give the necessary information in person, or by mail or telephone. The latter is the common form of renewal, though some libraries refuse this privilege. The procedure by telephone is regulated by the system of renewal adopted by the library. If the renewal is not completed at once more complete information is required. The process involves the recharge and the refile of the book card as outlined above.

Because some books are not renewable, the use of the telephone may involve difficulties. In small libraries, the assistant may ask the borrower to hold the line while a search is made for the book card, or the temporary slip necessary to complete the renewal is prepared. Or, the borrower may leave his telephone number and be called later if the book is not renewable. In larger systems, however, it is impossible to keep the telephone out of service so long, or to complete the recharge at once.



# BORROWERS' PRIVILEGES AND SERVICES 109

Date and number Jc 89	Card number	Author	Title	Call number	Date due	Telephone number	Asst.
125	86752	Steiner	Community organization	8222c	June 29	East 120g	D
126	"	Robinson	Mind in the making	R662	"	"	"
127	92812	Traserman	World's illusion	mc. 2	"	South 842g	Hc
128	74362	Derant	Story of philosophies	8951	June 26	Highland 16w	"
129	63240	Annunzio	Flame of life	973	June 29	South 14c	"
130	55960	Beard	Rise of American civilization	83682 vol. 1	"	Mag. 6713	"
131	84761	Snell	Book of American literature	85562	June 23	Belmont 14c	"
132	74312	Tane	Outward bound	822	June 29	City 7828	D
133	77628	Sassoon	Satirical poems	821 8252d 132	"	South 844g	Hc
134	99740	Swell	Retarded child	8389	"	Highland 134g	"
135	99762	Creswood	Ancient highway	"	"	Belmont 996w	"
136	79740	Labatini	Sea hawk	"	"	East 654g	D
137	"	Walpole	Green mirror	"	"	"	"
138	"	Eliot	Adam Bede	"	"	"	"
139	"	Gregory	Yellow leaf	91458	"	"	"
140	93370	Bigelow	Travels in matter & soul	91454 91454	June 27	Highland 44w	"
141	"	Swelling	Lucy of French chateau	91452 291	"	"	"
142	88801	Addison	Classic myth in art	9225	June 29	Mag. 213	S
143	"	Marshall	Greatest of these	"	"	"	"
144	"	River	Loneley furrow	"	"	"	"

TELEPHONE RENEWAL SHEET—SIZE 11 x 8

A simple, effective method of meeting this situation employs a *telephone renewal sheet*. This sheet is usually kept at the telephone, away from busy desks, and the information requested is simply arranged in ruled columns so that any one answering the telephone can obtain it. Each request is entered on a separate numbered line. The borrower is asked to state his registration number, telephone number, author and title of the book, call number if non-fiction, the date due (or date of issue) and is given the number or numbers included in his transaction as a receipt. The assistant taking the request enters his symbol in the space provided. The sheets are taken to the trays next morning, the book cards are withdrawn and each recharge is entered in turn. Each assistant working on these renewal sheets checks each book found by initialing the line. The sheets are dated with the current date and filed in a loose-leaf binder where they are kept for two months. When the borrower returns his renewed book, he knows his renewal number, and if difficulty or question arises it is a simple matter to verify the facts involved. It is equally possible to detect fictitious renewal numbers. The renewal sheet and the temporary renewal slip embody the same essential facts and answer the same purpose in recording the process. The advantages of the renewal sheet are: (1) the number on each line given to the borrower as his receipt; (2) the permanent form of the record. The sheet when used in connection with a renewal file obviates a record in the file under the original date.

Some libraries feel that the process of renewal entails more mechanical work than is justified. These are often large systems with full collections of books, or small libraries where the demand does not test the capacity of the institution. If renewals are not granted, all books for adults except those designated for short term loans may be issued regularly for twenty-eight days, and renewals then become a special privilege granted only by special request.<sup>1</sup>

The *renewal of juvenile books* is not common. Most books in

<sup>1</sup>See page 103.

children's rooms are charged for fourteen or twenty-eight days, and are renewable only if the child brings the book and card to the library when making the request. This is done in an effort to encourage the child to read and return books promptly, and to avoid the loss of books.

## **2. Transferring charge for books**

The policies of most libraries are definitely designed to discourage the transfer of books from one card to another. Unless this practice is regulated, groups of people can hold attractive books in their possession and pass them from reader to reader without permitting them to return to the shelves. Hence, numerous and varied are the restrictions which libraries impose in an effort to break up this practice. Certain libraries will not transfer books but require that the book be left for at least twenty-four hours. Others insist that the book be brought in, or the book and both borrowers' cards be presented in order to avoid confusion of records. In other libraries, no seven-day, reserved, nor renewed books may be transferred. Many libraries will not transfer books when the request comes by telephone. An effort is often made to prevent families from taking advantage of the library by requiring different addresses on the two borrowers' cards involved in the transfer. When all the regulations for a transfer are met, the book is discharged from one borrower's card and charged on another. In this process it is customary to note the borrowers' numbers entered recently on the book card in an effort to prevent the books being charged too often on the cards of borrowers conniving to keep unfair possession of books.

## **3. Reserving books**

In an effort to serve the borrower and to lessen the element of chance in the circulation of books, libraries have developed a system of reserving volumes in demand. Constant, fruitless search on the part of the public is thereby rendered unnecessary and the

library is able to assemble material desired by individuals or groups and to hold it for their use for a reasonable length of time. Two types of reserves are maintained in most libraries: (a) reserves of books for individuals who wish to draw them on borrowers' cards; (b) reserves of books or collections of books by classes or groups of readers. Since the latter service implies use by several readers, it is customary to hold these books in some designated place, often the reference room, where all wishing to use them may have equal opportunities.

(a) *For individuals.* When a borrower searches without success for a book or number of books, a reserve may be left for a title, in order that it may be held for him when returned and that he may be notified. This service involves little effort on the part of the reader. He fills in a reserve postal (or a reserve slip) which is a form calling for author, title and call number of the book wanted, the date of the request, and in some cases the borrower's telephone number. The borrower addresses the postal to himself (or adds his name and address to the reserve slip). A small fee varying from one to five cents is usually collected to pay for the mailing of the postal notice. In libraries where the fee for reserving non-fiction is nominal or waived altogether, a fee of five cents is sometimes charged for fiction. Some libraries reserve only non-fiction. Most libraries accept a request for reserve over the telephone. In some cases the assistant receiving the request for a reserve initials it, or uses a date stamp incorporating his symbol.

The *handling of reserves* in many libraries is a duty assigned to one assistant. If this is the practice, the reserves are allowed to accumulate during the day, and are collected the following morning by the assistant in charge. The reserve postals (or slips) are arranged by call number, preparatory to searching the shelves for the books or the file for the book cards. If the borrower has not included the call number, this must be supplied from the catalog. The postals (or reserve slips) are then taken to the shelves and a thorough search is made for the book. If the book is found, it

is held until the notice is sent to the borrower. If it is not, a search must be made through the various files of book cards in an effort to locate the record. If neither the book nor the book card is readily discovered in the first search, the reserve postal (or reserve slip) is held for further search at regular intervals. If the volume is in circulation, a signal of some kind is attached to the book card which is returned to the file. This may be a paper clip or a colored slip or two clips may be used to distinguish reserves from other records. Some signal must show the person who is slipping books that the returned volume is to be withdrawn from general circulation and held until the reserve card is sent. When the book card has been found in the trays, the postal notices (or reserve slips) are filed, usually by author's name or possibly by call number, and secondarily, by date of receipt, since borrowers must be notified in the order in which they have left requests for reserves.

When the book is returned and slipped, it is set aside in the preliminary sorting. The file of reserves is searched for each of the books thus assembled and the postals prepared for notifying borrowers that books are being held. If a slip has been used thus far in the process, the postal notice must be written in full, otherwise only the date the reserve expires is added to the card. The period for which the book is held varies from one to four days. The slip, bearing the name and address of the borrower and the date of expiration of the reservation, is then placed in the pocket of the book; or a similar slip is made if the original record is on a postal. All the postals for the day are then mailed. If the telephone number has been entered on the reserve, some libraries notify the readers at once that the book is available.

Reserved books may or may not be arranged in a definite way, depending on the number handled at one time. They may be shelved by date and call number; or, alphabetically by the names of borrowers. The latter arrangement aids in tracing books called for by a reader who fails to bring the notice and can supply no

definite information except that a reserved book is being held for him. The reserved shelf must be revised daily and all books removed on which the reserve limit has expired. If the reserve file shows no further request for a volume, the book is released. If other reserves are found, the next postal is sent. The borrower is usually requested to bring the reserve postal as well as the borrower's card in order to draw the book held for him.

In small libraries, a simpler method of caring for reserves suggests that the title of the book requested be written at the top of a blank card. Below this are entered the names of those wishing to reserve the title in the order of request. These cards are filed alphabetically by title. The book cards are clipped with a paper clip. When the book sought is returned, the librarian, noting that it is a reserve, notifies the next reader by telephone and crosses the name from the list.

*Reserves for suggested purchases.* Many libraries encourage borrowers to recommend the purchase of books, especially non-fiction. In this way individuals in the community with special knowledge of certain subjects may easily help the library to develop its collection. If the borrower suggesting the purchase wishes to see the book when it is ready for use, it should be reserved for him without fee. Borrowers may occasionally request the purchase of books which the library cannot buy because they are out of print and valuable, or have so special and limited an appeal that their use will not justify the purchase. When such titles are desired it is customary to borrow them from state library extension agencies or other libraries and to reserve them in the regular way.

*Duplication for popular reserves.* A regular inspection of the file of individual reserve postals may show many interesting things to the librarian. Here will be found accurate evidence as to the popularity of any definite title and the need for duplication can be estimated according to the rate at which reserves multiply. Libraries differ in the practice of buying additional copies of popu-

lar books, according to the size of the book fund and the demand. A predetermined number of reserves for a title may call for the purchase of additional copies. Interest in any local author or local activity may first be discovered through reserves left, and there are many ways in which the librarian may foster and spread these interests. In libraries where the book funds are limited a careful and efficient system of reserves may help the librarian to place the emphasis in the minds of the public on service rather than on limitations.

(b) *For use of class or group.* This special service usually involves close cooperation between the reference and circulation departments. The list of books wanted by the faculty of a school, a club or other group, is left at the library. When found, the volumes are usually charged to the reference department and shelved there and the book cards are filed in a separate tray, often marked "Ref." If it is desirable to keep the books of each collection together, the name of the teacher, club or course must be entered in each volume. Some books of this type are occasionally in such demand that they are charged only for a brief time, such as over night. Such titles are debate manuals, or books containing information which the public greatly desires, often because of some artificial stimulus, such as a newspaper contest. In some systems, individuals using the volumes reserved for groups are not permitted to take them out of the library at all. In others, brief loan may be granted by arrangement with the reference department.

#### 4. Renting books<sup>1</sup>

The demand for popular books in public libraries so far outruns the supply that many libraries have adopted a system of renting duplicate copies of recent fiction and in some cases non-fiction, for a small fee. The money thus received is usually applied to

<sup>1</sup>See Bostwick, A. E. *The American public library*. 3d ed. Appleton, 1923. p. 56-57.

the maintenance and increase of the pay collection. By the time the demand for these titles wanes they have usually earned their cost and are transferred to the free shelves. Libraries have overcome public objections to the collection of rental fees by making clear that the books in this collection are *duplicates* of titles which are being circulated free; that the collection pays for itself and that the free collection ultimately benefits by the transfer of these titles.

When the rent collection (duplicate pay or pay duplicate collection) has been established, some deviation from the common practice of charging and discharging is necessary, since (1) the length of the loan determines the amount of the fee; (2) the payment of the fee by the borrower is necessary to complete the discharge of the book and close the transaction. The book card for a book from this collection sometimes differs from the usual book card in that it includes a column where the sum paid for the use of the book by each borrower may be entered. The library keeps this record to guide in future purchase for the collection and to regulate the transfer of books to the free shelves. The date slip and the pocket usually carry a symbol as well.

(a) *Charging rental books.* There are two ways of charging fees for rental books, first by the day, and next by the week. If the fee is charged by the day, the date of issue should appear in the records to show at a glance the number of days the book has been out. The date is stamped on all records as in other charges, but a symbol is often used with the date on the borrower's card to indicate that the charge is for a rental book; again, there may be no entry on the borrower's card, the book being charged by the borrower's registration number or name and address, on the book card only. A separate file for rental book cards may be kept under date due (or date of issue) and a separate count is usually made of rental circulation. If the fee is a stated sum charged by the week and collected in advance, the date due must be stamped on the record to aid in computing the additional dues if the book is



kept longer than a week. The fees collected for the use of rental books vary. Frequently, the value of the book determines the amount of the daily rental and five or ten cents a week is charged with a regular extra charge for overdues which may be treated as fines. The practice of commercial circulating libraries is adopted in some places and a fee of two or three cents a day is charged for each book, with a stated minimum, usually five cents. There is seldom a limit to the number of rental books that may be taken, since the borrower pays for the use of them.

(b) *Discharge of rental books and collection of fees.* Upon its return a rental book is checked with the borrower's card and the book card is removed from the file. The rental fee is computed or the record is inspected if the fee was paid in advance. If the fee was not paid in advance, it is collected and the necessary cash record made.<sup>1</sup> In some libraries a further cash record is made on the book card for each circulation to show the earnings of each title, when this information is required for the transfer of the book to the free collection. If a uniform weekly fee is charged and additional fees collected on the return of rental books are treated as fines, the earnings of the collection can be estimated by counting the book cards for books issued each day on the assumption that each title earns only the definite sum paid for it in advance.

(c) *Transferring rental books to free collection.* Rental books are ultimately transferred to the free collection: (1) when the book has been in the rental collection for a certain length of time, varying from six months to one year; (2) when a volume has circulated a definite number of times; (3) when the rentals total a certain sum; or, (4) when the volume pays for itself. Common practice indicates that books are transferred when the rental fees total the cost of the book, or when the demand declines. Rebound rental books are often not returned to the collection. The process for transfer depends on the preparation of rental books

<sup>1</sup>See Chapter 6, p. 149.

for circulation. If they have been accessioned and cataloged, it becomes necessary to change the form of the circulation records, and to eliminate the rental symbols from all other records. If the books have not been so treated, an author or title list is usually kept on cards in the circulation department. When ready for transfer, the cards must be withdrawn and the books sent to the department which will prepare them for use in the general collection.

### 5. Charging material other than books

The public using modern libraries has long since ceased to regard them as mere accumulations of books. Much other material has had to be made easily accessible and in many instances it has been of such a character as to test the flexibility of present methods of charging, designed by library forefathers merely to circulate books. This material may be roughly divided into two groups: (1) printed material which can be circulated with simple variations through the regular channels, as for instance, magazines, maps, sheet music and scores, pamphlets, etc.; (2) material which by its form makes regular processes impossible, i. e., victrola records, music rolls, lantern slides, stereographic views, to which date slips, book pockets, etc., cannot be attached. In many libraries this material is circulated from special collections. If the regular borrower's card is not used in making the charge, a similar card of a different color, limiting its use to art, music, or other special collections, may be issued. If this material, for example, duplicate magazines, is regularly prepared for circulation, the magazine is equipped with book pocket, a book card, and a date slip of a distinctive color, to indicate period of loan, in this instance three or four days. However, maps, pamphlets, bound magazines and other volumes belonging to the reference collection may be allowed to circulate, usually for a limited period, on special request to registered borrowers. A *temporary book card*, incorporating sufficient information to identify the material lent, must be made

to record the charge until the transaction is closed. In some libraries, material of this type circulates with enough regularity to warrant a permanent file of temporary book cards to be used over and over. Much used sets of bound periodicals may be circulated in this way, by inserting the year and volume number on the temporary book card when each volume is charged.

Where the form of material circulated, for instance, lantern slides, victrola records, etc., makes the method of charging almost a matter of personal preference, local needs regulate the procedure and the period of loan. Some type of more or less temporary book card with uniform information, filed in regular files, and charged on special borrowers' cards, is suggested. The general rule for handling such material is that the whole process must conform as nearly as possible to the regular method of charging books and the borrower should feel his responsibility.

Among this miscellaneous material, clippings and pictures, both mounted and unmounted, constitute a large and important group. What is wanted by the teacher or student may be gathered from a general collection and put into an envelope, bearing a note of the contents. A temporary book card may be prepared and the collection charged as a unit for a definite period. Clippings and pictures are usually charged in addition to books and in some libraries are subject to recall. Children's, teachers' and reference rooms handle much of this circulation. Stereographic views and stereoscopes are often lent in the same way, though when circulated in sets a permanent book card is usually provided.

## 6. Charging books to staff and trustees

A generous policy is usual in regulating the use of books by the staff and trustees in any library. A growing knowledge, not only of the titles but of the contents of books in any collection, is primarily essential to the *library staff*, and some arrangement should make it easy for the assistant to read, and should encourage not only study, but the casual inspection of many books. There is no

leisure for this in busy libraries. The assistant's free time is limited and crowded with outside duties and other interests which are properly not too closely related to his work. With these conditions in mind, limitations as to the number of books allowed and the period for which they may be borrowed are often generously extended or removed. Fairness requires that the staff use of books shall not deprive the public, therefore it is customary to limit the number of short term books which may be taken by the staff and to require their prompt return. Occasionally the staff is not allowed to draw new magazines and new books until they have circulated to the public for a definite period or a definite number of times. A special file of staff overdues, which can be easily checked and followed up, is often maintained. Automatic renewal is usually granted. Fines are generally remitted and in some cases fees are not collected for rental books. The name of the assistant instead of the borrower's number is often used in charging. The privilege of using uncataloged books for limited periods is frequently granted the staff and this offers great advantages, particularly to the circulation assistant interested in knowing what new books are being added to the library and in reading or investigating them. A charge or check for these books is usually kept in the catalog department which has supervision of their use.

In a further effort to meet the needs of the staff, some large libraries have established special collections of books and magazines for staff use. Such a collection contains duplicates of books bought for general use, which are kept while the demand continues from the staff, and are then released and placed in regular circulation. These books are charged for two weeks to the name of the assistant. Various book reviews are often supplied for staff use in circulation departments, and assistants are expected to read these in an effort to keep informed. In fact, some libraries allow a small amount of library time each week for the reading of book reviews. In these various ways, librarians endeavor to encourage reading by the staff, not only for the benefit of the public, but for

the increased pleasure the well-equipped assistant finds in his work.

*Library trustees*, because of their special service to the library, are generally regarded as entitled to any privileges they may demand. Staff privileges may be further extended and any reasonable requests met. Since the trustees are relatively few in number, their demands are not likely to interfere materially with regular procedure. The assistant in a large library will be aided in recognizing trustees if the library has supplied them with some type of special identification card.

## **7. Return of books to any point of distribution**

In many large libraries books drawn from any distributing center in the system may be returned and discharged at any other point in the system. To accomplish this satisfactorily implies a system of rapid delivery touching all distributing points at frequent intervals. This must be arranged so that the agency receiving the book returns it promptly to the place from which it has been charged in order to prevent unnecessary overdue notices.

## **8. Restricted books**

The use of certain types of books in public libraries is such that these volumes receive special handling as restricted books, a name suggestive of limitations to the staff without implying censorship to the public. They may be old, valuable and rare volumes, impossible to replace and not intended for general use, but rather preserved for their interest. For these volumes a signal or symbol is incorporated in the call number and on the records, which cannot fail to attract the attention of the assistant. Thus put on guard he will exercise careful judgment in allowing the borrower to have such books. Identification is important in granting such privileges. When the book is returned the assistant may be required to collate it to see that it is in perfect condition.

Another type of restricted volume is that which may be regarded as harmful to certain types of readers because of its con-

tents. Such books may be volumes on medicine, purchased for students or special groups who are entitled to their use. In addition, much discussed titles of questionable moral tone create problems. In libraries wishing to exercise no censorship beyond their standards of choice in selection, such books of literary and artistic merit may be included in the collection but their circulation limited to adult readers whose intelligent use of them is not to be questioned. The book card for this type of book bears a signal for the staff which should be unobtrusive and not readily noticeable to the general public, since an indication of restriction may whet the appetite of the reader.

## 9. Quarantined books

Readers are likely to consider books as factors in the spread of contagious or communicable disease. Though this has never been satisfactorily demonstrated, public fears must be regarded.<sup>1</sup> Most libraries endeavor to cooperate with city health departments to protect the health of readers by observing intelligent precautions in the use of books exposed to such diseases. The practices to be followed are often dictated by the city or town departments of health. Hence policies change and vary widely in different places as directed by local medical opinion.

A common procedure is for the city health office to notify the library daily or at regular intervals of cases of contagious disease reported by physicians. No search of library registration files is made for the names listed since borrowers not regularly registered may have books drawn from stations or other distributing agencies. Notice is sent to all such persons with a request that they report any books they may have out, and the dates due (or issued). If books are overdue, fines are remitted and the reader is asked to return them wrapped and to state that they have been exposed to contagious disease. Or, books may be gathered by the quarantine

<sup>1</sup>See Laubach, C. A. Possible role of books in the dissemination of the contagious diseases. *Johns Hopkins Hospital Bulletin*, 27: 183-6, June 1916.

officer at the time the house is quarantined. Libraries then follow varied practices, planned not only to safeguard the public, but to reassure readers fearing infection. Books exposed to epidemic types of disease, such as smallpox, scarlet fever, diphtheria, or spinal meningitis are usually destroyed in meeting the demands of the public. This should be done whether or not strictly justifiable from a scientific point of view. Books exposed to less virulent types of disease are often fumigated with formaldehyde by health officers at the time the patient's home is disinfected, or the books are exposed for several days to direct sunlight, for no germ can live in the sunlight. The latter practice is today generally accepted to be more effective.

In the case of tuberculosis, the public has been widely educated and incidentally filled with fear. So, though doctors disagree, the library may safely let it be known that books returned from homes where tubercular patients are being cared for, are temporarily withdrawn from circulation and exposed to the sunlight.

As authority for the procedure, L. W. Hutchcroft,<sup>1</sup> Wisconsin State Board of Health, says:

Time and sunlight are recommended as the best means to accomplish the destruction of infectious material deposited upon books. Formaldehyde fumigation alone is not satisfactory for the disinfection of books. The withholding of books from circulation for fifteen days, at the same time exposing them to the sunlight in the case of all the usual communicable diseases except tuberculosis, in which case their destruction or withholding from circulation for one month is recommended.

#### 10. Inter-library use of borrowers' cards

In many communities today there is a growing practice of extending library privileges to a transient visitor who shows a library card from his home library. Before allowing the card to be used

<sup>1</sup>See Hutchcroft, L. W. Books and communicable diseases. Wisconsin Library Bulletin, 17: 122-23, July, 1921.

the librarian to whom it is presented will satisfy himself that it is in force, that the borrower's record is clear, or at least that there are no overdue charges for books. The library safeguards itself in charging books under these conditions by holding the borrower's card with his home address, and by adding a record of his local address. This small courtesy may make friends, not only for the system granting the privileges, but for libraries everywhere, since readers usually appreciate favors extended without unnecessary red tape.

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## THOUGHT QUESTIONS

1. Discuss the library's right to restrict the circulation of definite books or classes of books.
2. Just what would you say to a borrower who presented two seven-day books to be charged when only one is allowed by regulation? Consider both the agreeable and disagreeable borrower.
3. Outline a fair and useful system of reserving books for individuals in a medium-sized public library. If a book is reserved after a reader has taken it out, does it seem fair to you to deny a renewal? How would you regulate this? What differences are required in reserving books for groups or classes, and for individuals?
4. Discuss both sides of the question of renting books in a public library. Answer the objections of an irate reader who claims that no fees should be charged for books in a tax supported, free public library.
5. What are the disadvantages of renewal by telephone? How far, in your opinion, are the disadvantages invalidated by the advantages?
6. Name possible differences in a library's policy and procedure for handling quarantined books in an industrial community, (a) with a good health office, and (b) with a poor health office.
7. Discuss the opening of a small library on Sundays and holidays. Compare with the needs of a large library for similar service. If the main library is open, is it necessary or unnecessary to open branches? Why?
8. Compare (1) the renewal of fourteen-day books on request with (2) the automatic renewal of long term loans and (3) the practice of issuing books for twenty-eight days. What are the advantages and disadvantages of each practice?
9. Compare the practice of filing book cards for renewed books in a special file with that of filing them under date. Which method would you adopt in a library of medium size? Why?
10. Give reasons for granting special privileges to certain groups of users. What groups should be entitled to this service and how may it be fairly granted?

11. What are the advantages and disadvantages of fixing no definite limit to the number of books allowed on an adult borrower's card; a juvenile borrower's card?
12. Draw up a set of rules for the circulation of pamphlets and clippings. In what way may the methods of circulating this material differ essentially from those of circulating magazines?
13. Outline in detail a procedure for handling rental books in a small library.

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## CHAPTER 6

# Overdues, Lost Books, Fees, and Cash Records

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|-------------------------------|-----------------------------------|
| I. FORMS OF NOTICES           | V. DELINQUENT BORROWERS           |
| II. NOTICES FOR OVERDUE BOOKS | VI. RECORDS OF OTHER FEES         |
| 1. First fine notice          | 1. Fee for rental books           |
| 2. Follow-up notices          | 2. Fee for reserve postals        |
| 3. Tracing of borrowers       | 3. Fee for borrowers' lost cards  |
| 4. Unpaid fines               | 4. Fee for non-resident borrowers |
| III. FINES AND DAMAGES        | 5. Deposit of temporary borrower  |
| 1. Overdue books              |                                   |
| 2. Damaged books              | VII. BALANCING CASH               |
| IV. LOST BOOKS                |                                   |
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If the rules governing the free use of any public library were accurately observed, there would be no money transactions involved in the circulation of books to the residents of any community. The question of fines and fees for damages and loss arises only when the rules for circulation are infringed, as when books are not returned on time, or books are lost, mutilated, or destroyed. *The primary purpose of the levying of fines is to secure the return of books so that they may be used by other borrowers.* The intention of the library is to penalize the borrower for an unreasonable detention of books, and not to earn money. This position should be made clear so that the borrower will not feel that the payment of a fine entitles him to keep books overtime. The fee involved is nominal and in no way compensates for the procedure necessary to secure the return of overdue books. With the introduction of the cash penalty, there develops the need for a system of collecting, recording, and caring for funds. Here the librarian usually endeavors to adapt accredited business methods to the uses of the library.

## I. FORMS OF NOTICES

The forms used in sending communications from the library to the borrower may indicate clearly the attitude assumed by the library. They should therefore be carefully composed by those in authority who are familiar with policies, specifically the head of the circulation department, collaborating with the librarian. The public is inclined to take seriously all procedure involving fines or fees levied by a free public library. Therefore, most libraries, endeavoring to meet local objections, have devised individual routine methods to secure the return of overdue books. Conditions as demonstrated by cooperation between city departments, schools and the library, all determine procedure and suggest avenues of approach from the library to the borrower. The number of notices for the overdue book varies from three to five, as influenced by the size and character of the community. The forms used are postcard notices, or form letters sent by regular or registered mail, the latter involving the return of a receipt. In difficult cases notices may be delivered in person by library messengers, or as a last resort, by the police. The cost of postage and messenger is commonly added to the amount of fine, or the damages assessed. The legal department of the city is often used in endeavoring to secure the return of overdue books, or compensation for their loss.

Notices must be carefully phrased to meet postal regulations of the United States Government which forbid the sending of any dun or bill on a postcard. If this type of notice is used, it can merely call attention to the author and title, or call number of the book, and the date it is due, and intimate that a prompt return will prevent the accumulation of fines. When borrowers fail to respond to this suggestion, later notices usually take the form of letters, so that the request for the return of books may be more plainly and emphatically stated.

## II. NOTICES FOR OVERDUE BOOKS

The interim between the date the book is due and the sending of the first notice varies usually from three to seven days. Libraries allowing a longer interval expect a number of these books to be returned without notice and thus save the clerical work involved in notifying the borrowers. Other libraries act more promptly to avoid the larger fine for the borrower. No uniformity obtains as to the interval between notices. Libraries usually follow up notices at fairly short intervals, in the effort not to lose trace of books and borrowers.

.....PUBLIC LIBRARY	
....., 192.....	
Please return.....	
.....	
.....	
.....	
charged to your card number.....	
Due.....192.....	
Two cents a day is charged for each book overdue. If you think a mistake has been made, please notify us. If you have returned this book within the last twenty-four hours, disregard this notice.	
L. W. BOOKMAN, <i>Librarian</i> .	
Bring this card with you.	Per.....

FIRST OVERDUE NOTICE—Post-Card Form.

1. **First fine notice**

Until the first fine notice is sent, book cards stand in their place in the file under the date. Notices for several days' overdues may be sent by small libraries once or twice a week, but large libraries find it necessary to send them daily to prevent accumulation. At the proper time the file of book cards now overdue for the specified period, calling for notification, is removed. When the addi-

tional records have been made, these book cards are again filed in place in the renewal file with signals attached denoting that notices have been sent.

In spite of the care regularly exercised in slipping books and verifying the slipping, it is usually a good practice before any notice is sent to search for the book: (1) in its regular place on the shelves; (2) on the return shelves, where books ready for shelving may be held; (3) among the returned books waiting to be slipped; (4) among the snags; and (5) among the books ready for the bindery. In libraries where much time and care is spent in verifying the slipping and shelving, the search for books before sending first notices may be eliminated, or at least curtailed. After the search, book cards are rearranged by the borrowers' registration numbers so that the names and addresses of borrowers may be conveniently ascertained from the registration book or the numerical file. All volumes charged to one borrower's number, overdue on the same day, are thus assembled so that the notice for several volumes may be sent on one postcard.

Practice differs as to the next step in this process. In libraries using a registration book, the borrower's name and address may be copied directly from the record on the notice to be mailed. The registration number, the date the book was due (or issued), author, title, and call number are added and the notice is then ready for dating and mailing. The fact that an overdue notice has been sent is indicated by stamping the date with a special stamp below the borrower's number on each book card. This process is repeated for all book cards which may then be refiled, or they may be filed separately in an "overdue" file, arranged in regular order, without regard to date. The renewal file is also carefully searched for overdues, which are usually handled separately.

If the numerical file is used, small libraries may fill out overdue notices at the file as outlined for the registration book. In larger libraries a blank slip is clipped to each book card or to those for each borrower, to remain until the books are finally returned.

By reference to the numerical file the name and address are added to each slip. The notices may then be filled out rapidly, away from the numerical files. The disadvantage of making this slip for the first notice is that an apparently unnecessary record is made for the borrowers who return overdue volumes before second notices are required. It may take less time to look up the borrowers' numbers again in sending the fewer second notices than to copy this information for each first notice sent. When the second notice is sent, in any case the slip should be prepared to save further search. It is also added as soon as complications arise, such as the borrower claiming that the book has been returned, or the post-office returning the notice because the borrower has moved. The use of this slip saves space on the book card, which is a permanent record. It traces, furthermore, the whole history of the library's effort to secure the return of the overdue book and may thus become a regularly defined though temporary record.

Branches ordinarily follow the same procedure as the main library. When a book which is charged to a borrower registered at another point in the system becomes overdue, the borrower's number is reported to the main library by telephone or note. From the union file the branch can be supplied with the name, address, and date of expiration of the reader's card, a record which is often inserted in the branch records for future reference.

## 2. Follow-up notices

Follow-up notices are sent at from five to seven day intervals for overdue books not returned in response to the first notices. Usage indicates that the *second notice* may be either a post-card, somewhat more insistent than the first notice in its appeal for the return of the book, or a letter demanding attention. *Before the second notice is sent, the shelves are searched thoroughly for the book.* It is not unknown in open shelf libraries for the borrower to leave the book in some inconspicuous place, thinking thus to



.....PUBLIC LIBRARY

.....192.....

*To the Holder of Card No.....*

You have neglected to comply with a post-card request to return the following, charged against you:

.....

.....

.....

As we have heard nothing from you, we assume that our records are correct and we are, therefore, again obliged to call your attention to this matter.

If we do not hear from you within a few days, a messenger will be sent for the item or items listed above for which a messenger charge of 25 cents will be made in addition to overdue charges at two cents a day per item.

Please give this your immediate attention.

L. W. BOOKMAN, *Librarian.*

Per .....

avoid the consequences of having kept it too long. Such a borrower must be shown that he is responsible for the return of the book until the charge on his card has been canceled. A letter requesting that he bring the borrower's card to the library and pay the amount of fine due should be sent as a disciplinary measure.

When the slip giving the history of the transaction has been attached to the book card, the sending of the *second notice* is indicated by a stamping of the second date. Otherwise a slip giving the necessary information for further follow-up notices is attached when the second notice is sent. Each step from this point must be recorded as it is made.

If the borrower's home telephone number is available, an effort to reach him in this way is often made at this stage of the procedure or later. He may also be reached through his business address by mail or telephone. The latter, however, is not a successful or desirable method of reaching employees in large plants and should be a last resort.

The *third notice* is by common consent a letter, emphatic in tone, stating the consequences of failure to return the volumes. This notice often says plainly that unless the book or books listed are returned within a definite period, a messenger will be sent for them, and the borrower will be responsible for the return of the books, the payment of the fine, and also for a fee, usually twenty-five cents, for messenger service. At this stage of the procedure, some libraries suggest the necessity of appealing to the legal department of the city if the borrower continues to disregard the library's requests for its books.

The *fourth overdue notice* is usually sent by messenger, who may be a special library employee, or a member of the city police force. In some cases a member of the staff may be drafted for this service. The notice frequently takes the form of a bill made in duplicate giving the amount of the fine due, the sum due for postage covering previous notices, and the fee for messenger service. The usual information as to author, title, call number of the

book, and date due, as well as the name and address of borrower, and the cost of each book, also appear on this bill. A place for the messenger's signature is provided, allowing him to leave the notice as a receipt if he succeeds in settling the account. Otherwise he leaves the statement with or for the borrower.

In spite of all efforts most libraries lose many books in the course of a year through irresponsible borrowers. These losses must be recorded in the circulation department files, and the borrower's privileges may be suspended when he fails to return library books or to pay fines.<sup>1</sup>

### 3. Tracing of borrowers

When borrowers have failed to notify the library of a change of address and the post-office returns the notices because it is unable to find the borrower, the telephone directory may supply the new address, and the borrower may be called. As a last resort, it may be possible to obtain the reader's correct address from the reference or guarantor if such names have been required in registration. The most effective method is to secure the correct address from the borrower as he returns his overdue books.<sup>2</sup>

In addition to these regularly outlined procedures, members of the staff individually, as opportunity presents, may attack these difficult problems of long overdue books by interviewing flagrant offenders who may be recognized in the library.

Tracing juvenile borrowers presents special problems. If a search for the parent or guardian who has signed the child's card and has given a business as well as a residence address brings no results, the schools can be of service in locating children or books. Lists of children not otherwise found may be sent to the attendance officer, who will often cooperate and supply correct addresses as well as secure the return of many volumes. All changes of addresses must be incorporated immediately into the registration records.

<sup>1</sup>See page 144.

<sup>2</sup>See page 140.

## PUBLIC LIBRARY

To

1

No.

## Address

This is to certify that a library messenger has called for the books named below. Please return them with this notice at your earliest convenience.

Book No.	Author	Title	Due	Value	Fine	Fees	Total

**TOTALS**

Received.....books and \$.....cash.

Date..

## Messenger

**MESSANGER'S NOTICE**—Size 5 x 8 inches.  
(See caption under Messenger's Report.)

## MESSENGER'S REPORT

 $\tau_0$ 

No.

## Address

## Not at home

**Promised to send**

### Additional information over

**Still due:**

## Books

Cash \$-

Book No.	Author	Title	Due	Value	Fine	Rees	Total

TOTALS

Received.....books and \$.....cash.

Date:..

*Messenger*

## MESSENGER'S REPORT

**MESSENGER'S REPORT**  
This Report is made out as a carbon copy of the Messenger's Notice. The notice is left with the borrower and the messenger's report is returned to the library.

#### 4. Unpaid fines

When the borrower returns overdue books with his borrower's card and fails to pay the fine, this is computed and added to the other fees owing, and the total is entered on the borrower's card. This card is filed by the reader's name in a separate file or in the registration file with the borrower's application.

Some libraries send a letter to borrowers who owe fines of sufficient size to warrant it. This notice calls attention to the amount and period for which the fine has been owing and stipulates that the borrower may resume his library privileges by payment of the sum charged against him.

The necessary facts of this transaction are sometimes recorded on a separate fine slip and filed in a special file under the borrower's name. Otherwise the fine slip may be clipped to the application card or to the borrower's card, held for unpaid fines.

### III. FINES AND DAMAGES

The collection of fines for overdue books is a difficult problem involving intricate detail which must be handled with fairness both to the borrower and the library. The method of figuring fines and making the records will be settled by the library administration. Nearly every question involved is treated in different ways by different libraries, a fact which leads to the inclusion in this chapter of various processes. Whatever the variations in practice, it is undoubtedly wise to keep an itemized daily cash record which should be balanced at least once a day. This statement with the cash should be turned over to the library office daily as it is unwise to accumulate large sums of money at desks where free access must be allowed many people.

#### 1. Overdue books

(a) *Amount of fines.* Some libraries levy no fines for holidays and Sundays, since they are not open for the circulation of books

on those days, while other libraries collect such fines on the principle that these days are counted in the regular period of loan. The fine commonly charged for an overdue book is two cents a day, which may be reduced to one cent for children. The cost of postage in some cases is added to the fines due because the reader has caused the library to expend this sum in actual cash in an effort to secure the return of the books. It is customary to charge the fine due for each book without regard to the number overdue, since the reader is responsible for all. Volumes of a work are counted as one book, however, and the fine figured as if for one title. Fines for material other than books may be computed at a different rate. Magazines may have a special rate and pictures and clippings may be lumped, a certain number being considered the equivalent of a book. Material lent over night and returned late is sometimes more heavily penalized than ordinary volumes, a stated sum being assessed by the hour.

Though two cents a day seems a nominal sum, the collection of this penalty in certain cases would give the borrower just cause for complaint. To impose a fine in excess of the value of any single book is not considered proper procedure. Hence some libraries name a *maximum fine*. This may be a definite sum such as one dollar, though a better practice will suggest an indeterminate amount regulated by a ruling to the effect that the fine collected may not exceed the cost of the book or the magazine involved. This flexible procedure is capable of various interpretations and will be elaborated further.<sup>1</sup>

(b) *Collection of fines*. When a book is returned, a comparison of the current date with that stamped on the date slip draws attention to the overdue book. A clearly printed calendar, or some similarly arranged device kept in a prominent place at the return desk, aids in counting the number of days the book is overdue. The assistant then computes the fine, receives the payment, and makes the necessary change. This figuring may be

<sup>1</sup>See Section V of this chapter.

quickly and accurately done by the assistant or by consulting a fine computer, which is used in many libraries, adjusted to local procedure by counting Sundays and holidays in or out.

If the book is sufficiently overdue for a notice to have been sent, it is frequently the rule to slip the volume before the borrower leaves. This should be done quickly during the payment of the fine. If the record is clear the borrower is released at once. Slipping the overdue book in the borrower's presence may enable the library to verify and incorporate needed corrections in library records. (1) If the borrower has changed his address and failed to notify the library, "Get correct address" may have been entered on the slip attached to the overdue book card when the postcard was returned undelivered. The change of address form can then be filled out. (2) If the loss of the borrower's card has been reported on receipt of the fine notice, "Hold card. Borrower not using" may have been stamped on the records and further trouble avoided if the instructions are followed. (3) Books claimed to have been renewed but in reality overdue are brought to light; or those renewed when they were already overdue. In the last case the unpaid fine will have been entered on the book card or the attached slip and should be collected before the borrower's card is released. Many snags, and the making of temporary notes in the records, are avoided by settling in advance points from which controversy might develop.

(c) *Record of fines.* Common usage suggests that a record should be kept of the amount of each fine collected by every assistant in such form as to make possible a check and balance on the sums received. This is more accurate and businesslike than to count the money in a cash drawer at intervals.

Two methods are commonly employed. The first and older method is a cash sheet or book kept at every place where funds are handled on which each assistant enters the sum collected and an initial. Other information, such as the borrower's registration number, may aid in identifying books involved in the transaction



and in settling complaints. This practice is not common, however, and may complicate an otherwise fairly simple record. The sheet or book should clearly distinguish between fines, damages and other fees.

The second means of recording fines is by a cash register. This has all the advantages of an automatic mechanical procedure, eliminating as far as possible the opportunity for mistakes in entry and for failure to enter. Grave doubt has persisted in the minds of some librarians and boards of trustees as to the wisdom of installing a cash register, chiefly because of the expense and also because it seems to introduce a commercial element into the library. The staff often welcomes this innovation, since its mechanical precision stabilizes a process which may be difficult for the busy assistant to carry through accurately when entry in a book is involved. Different types of cash registers are obtainable on which various charges can automatically be entered, e. g., rentals may be recorded separately from fines. Many libraries find the simple machines entirely adequate. The more elaborate machines may provide a key for each assistant, incorporating a symbol and tracing the entry for each sum of money. The advantages of the larger machine can be obtained with simpler machines by the use of symbols pencilled on the visible roll attached to the register to record the amounts collected.

(d) *Deferred and remitted fines.* Not infrequently the borrower who returns a slightly overdue book may wish to use his card but finds it impossible to pay the fine at once. If the fine is not in excess of a small stated sum, possibly from ten to twenty-five cents, the borrower may be allowed to draw a limited number of books. He may or not may be permitted to take his card with him. The fine must be entered, preferably in ink, on the borrower's card and collected when the card is next presented.

Leniency tempered with a proper firmness in collecting fines owed by children is indicated in library practice. In some systems it has become a matter of routine to remit fines due on juvenile

cards, wholly or in part, annually or biennially. Children's Book Week is a fitting occasion during which to make this effort to restore library privileges to the child whose card has been held for unpaid fines. A better practice, however, would permit the use of juvenile cards on which fines are due, by arranging for small periodic payments, even a few pennies at a time. Each case should be utilized individually by the children's librarian to train the child in good library habits and to *arouse a sense of responsibility*. Otherwise the child will be transferred to the adult circulation department, expecting to find there a leniency toward the payment of fines, which does not exist.

## 2. Damaged books

When a book is discovered to have been damaged while in the possession of a borrower, the extent of the injury must be determined and the sum to be charged the borrower must be decided. Wherever possible a definite schedule of prices has been arranged to meet accidents occurring frequently so that a uniform penalty may be exacted without the need of consultation in each case. For damages easy to repair, such as a torn book pocket or date slip, a nominal sum is asked. In case of damage to book covers which makes rebinding necessary, the borrower often has to pay the price of rebinding with some allowance for the condition of the book when it was taken out. If pages are torn or soiled, each case is handled individually. For minor damages a sum varying from five cents to ten cents is a common charge. In levying penalties, the age, the general condition, and the value of the book should always be considered.

If a book has been so damaged that the copy must be replaced, each case is weighed and adjusted on its own merits. The library will have a declared policy stating whether the borrower must pay (1) the list price of the volume, (2) the original cost of the volume to the library, or (3) the cost of replacement. If the list price is charged, the borrower must pay the retail price with-

out the benefit of the discount allowed to libraries. If the cost of the volume to the library is required, he has the advantage of the discount and may have a further advantage if the price of the book has been advanced. If the cost of replacement is demanded and the book is in print and easy to acquire, the reader profits by the dealer's discount, but if it is out of print and rare, real hardship may result for the borrower who may have drawn the book with no accurate idea of its value. The library will make a fair adjustment under these circumstances and may arrange to accept the price of a satisfactory reprint of the damaged book, if such is available, rather than that of the original edition.

The sum to be paid for a damaged volume may be ascertained from a variety of records. Depending on the library's method, this price may be indicated in some symbolic way on the book card; it may be entered on the verso of the title page or other designated page in the book; or it may be available only in the catalog or order department. In some libraries the accession book will supply it; in others, the shelf-list must be consulted, or trade catalogs, as a final resort. This same information is needed in handling lost books, discussed later in this chapter, and the method here described for ascertaining the cost of books applies also to that situation.

An unsettled question connected with the payment for damaged books arises when the borrower returns a volume to the library, pays the sum asked for replacement, and then wishes to take it with him. Occasionally libraries allow the reader to keep the book after marking it "sold," or stamping "void" over all marks of library ownership in the volume, but other libraries will not permit the book to be retained by the borrower under any circumstances.

The damages considered above are usually the result of accident and are often reported by the borrower who wishes to assume responsibility for his own acts. Another type of damage, the *defacement of books*, maps, and pictures, is more difficult to

detect and to handle since the intent of the reader is to evade and not to acknowledge responsibility. Art books, magazines and other books with fine pictures are frequently withdrawn from open shelves and allowed to be used only when a reader signs for them. If the individual responsible for defacing books can be caught, he is usually taken to the librarian. The active co-operation of the municipal law department in handling such cases is assured since most states have a statute treating this offense as a crime punishable by law. There are also those borrowers who agree or disagree so enthusiastically with the deductions of an author that they feel compelled to write marginal notes and comments on books. These are often impossible to trace, but if a guilty borrower can be caught, one fine may cure a lifelong habit. Librarians discourage in every way the marking of books and encourage the borrower finding such markings to report them. Since the principles governing the circulation of books usually apply to other material as well, fines and damages are assessed and collected in the same way. If a number of pictures, clippings or a collection of pamphlets are charged in a folder or envelope as a unit, fines are computed as for one book.

*Record of damages collected.* When the extent of these various and sundry damages to library books has been determined and the sum collected, an entry is made in the cash records. Small charges for minor damages may be added to the fines, without separate entry. But damages involving larger sums are usually enumerated in detail with the borrower's name, address and registration number, as well as the call number, author, and title of the book, and the sum involved, or they may be taken with a note direct to the library office. A receipt for the sum paid is given only on request.

#### IV. LOST BOOKS

The books lost in any circulation department fall into three classes which call for different methods of handling: (1) lost

books not paid for; (2) books lost and paid for; and (3) books lost from the shelves without record. The *first type*, already considered in this chapter, includes the books drawn on the borrower's card which cannot be traced and are never returned. As has been stated, the charges for such books are entered on the borrower's records and the volumes must ultimately be withdrawn from the library records. In case of replacement, the library must pay for the new copies since payment cannot be secured from the borrowers who are responsible. The *second type of lost book* is that lost and reported to the library by the borrower who wishes to settle the claim held against him. The *third type of lost book* is probably the most difficult with which to cope since the volume disappears and the assistant, unable to trace it through records, knows that it may be either out of place on the shelves, or stolen. Or it may have been taken informally by a reader who means to return it at his own, rather than the library's convenience. Such loss is the inevitable accompaniment of open shelves and free and unrestricted access to books; but it is generally accepted as an unavoidable handicap to be submitted to by libraries, since it is far outweighed by the tremendous advantage readers enjoy in being able to choose books from the shelves rather than from catalogs or lists. The circulation librarian, recognizing the temptation of open shelves to certain people, will keep a vigilant though unobtrusive surveillance of readers browsing among shelves, and may even inspect all books taken from the room by any reader.

### 1. Report of lost books

When a book is reported lost, the book card is located in the trays to see when it is due. If there is a possibility of locating the volume, most libraries allow the borrower a specified time, usually two weeks, to search for it, stopping fines for the period. The legend "Reported lost" must be added to the book card as well as the date when some report will be expected. The book

card may be filed variously: (1) in a separate file marked "lost books"; or (2) under the original date; or (3) in renewals; or (4) under the date of the expected report. If the book is overdue when reported lost, the amount of fine, together with the fees for postage or messenger, must be added to the slip attached to the book card, for collection in the event that the book is found and returned. Here we reach another controversial point in library practice. If the borrower has lost a book and reported it with a view to paying for it, some librarians feel that the value of the book should be the maximum charge. Others believe that if the book was overdue when first reported lost, the fine should be added to the value of the book. Because of his failure to notify the library of his loss, the borrower has required that additional and unnecessary effort be expended to secure the return of an overdue book. Hence these libraries charge the maximum fine and postage and messenger fees in addition to the charge for the book. In some other systems only the fees for messenger and postage are added to the price of the book, no fines being charged. Occasionally, to expedite settlement, a library will revive the fine at the expiration of the time granted for search, if the borrower fails to report.

In view of these various practices it may be well to analyze an apparently fair and reasonable procedure. It is important that the library be notified at once when the borrower has lost a book since he cannot return it when it falls due. The book may be found and returned by another person, or reserves may have been left for the volume. The loss of the book involves an actual financial loss to the library for which the borrower should make restitution. Thus it seems reasonable for the borrower to pay the fine and the fees due at the time the book was reported lost, as well as the price determined since it must be replaced.

## **2. Payment for lost books**

When the borrower is unable to trace the lost book, and comes to pay for it, the amount to be paid is determined either through

library records or the proper trade lists or catalogs. The borrower may be told what he owes or a bill may be made for the book and such additional charges as are due. In the latter case, the bill when paid may be signed as a receipt and the charge canceled on the borrower's card. The record attached to the book card provides the necessary information for clearing the borrower's record upon receipt of the payment. Payment for a lost book is frequently omitted from the daily cash records at the desk, but a separate entry giving full information is recorded in the library office before the book card is forwarded for the discard and replacement of the book.

In spite of all efforts, at the time the book was reported lost, to make sure that it would not shortly be returned, the borrower often finds the volume and brings it to the library and requests a refund of his money. This request may or may not be granted, according to the policy of the library. Common practice suggests that if the price of the book has been paid recently, i. e., before the book is actually replaced, it may be well to refund the amount, not including fines or fees. In order to encourage the prompt return of such books, some libraries deduct a stated sum, varying from twenty-five to fifty cents to compensate for unnecessary changes in records. If a long interval has elapsed between the payment and the return of the book, all records probably will have been changed and the volume replaced. In such cases libraries may refuse to make a refund, since the period during which the library has not had the use of the book seems sufficiently long to justify keeping the whole sum. The borrower, of course, leaves the book. The full details of any refund must be incorporated in the cash records.

## V. DELINQUENT BORROWERS

In extreme cases when all efforts fail to secure the return of overdue books, or the payment of fines, or possession of the borrower's card, the facts of the borrower's delinquency must be

incorporated in the permanent files. These entries may be made at a definite period after the sending of the last notice, or irregularly to conform with the desk routine. The record of delinquent borrowers may be (1) a special name file, or (2) a record incorporated in the registration file. The information generally recorded includes the borrower's name, address, registration number, and date of expiration of his card. Space should also be allowed to enter the author, title, and call number of books not returned, as well as the date they were due and the amount in arrears. If this sum is itemized, the borrower can be shown how the total was reached. This information may be entered on a special slip or on the borrower's original application card. Such applications are usually held in the file when they have expired, so that the borrower wishing to re-register may be given the opportunity to pay his debts.

If the borrower's original application has been filed numerically and the alphabetical file is made from duplicates which give only the name and address, registration number and date, the blank space on the card offers an admirable space for the records of delinquent borrowers. This obviates the building of a separate file or making a catch-all of the original application card.

Branch delinquent records must be incorporated in the union registration file. All essential facts should be sent to the main library at intervals, to be promptly entered in order to prevent borrowers who have forfeited library privileges at one branch from applying and securing duplicate cards at other points of distribution.

## VI. RECORDS OF OTHER FEES

The amounts of money collected at any circulation desk for fines, damages and other fees should be itemized separately as they are entered in the daily cash record, or on the cash register. In some libraries the cash drawer is so arranged that rental fees, reserve fees, and duplicate card fees can be kept separately, added



at the end of the day, and entered as totals in the daily cash records. Some of the details of handling these cash fees have been touched on in previous chapters. For purposes of emphasis and unity the records involved in these transactions are here treated more fully.

### 1. Fee for rental books

When a *daily fee* with a stated minimum charge is collected for rental books, a stamp bearing the date of issue aids in computing the sum due. In many libraries rental books are slipped at once as returned and the amount earned by each copy is entered in the cash records and on the book card. If slipping is deferred, the earnings must be figured again at a later time, if an accurate account of the book's earnings is to be kept on the book card.

If a *weekly fee* is paid in advance with an added charge for additional days, the added charge may be treated as a fine and no separate rental record kept. In libraries transferring rental books to the free shelves when they have earned what they cost, an accurate record of the whole sum involved in each transaction, including the added charge, may be kept on the book card. In copying filled book cards, the earnings should be added and the sum total transferred to the new card.

### 2. Fee for reserve postals

The library usually collects a fee for reserving books sufficient only to cover the cost of the postal notice. This may be one or two cents according to the form of notice used by the library. Reserve fees are usually entered on the cash record as collected; however, they may be accurately estimated at the end of each day by counting the number of reserves left during the day.

### 3. Fee for borrowers' lost cards

Fees for duplicate cards may be recorded in the same way as are the fees for reserve cards. It will be remembered from the

chapter on registration that fees are charged only for borrowers' cards which are lost or destroyed. The number of such cards issued during the day will indicate the sum total of the collections for this service. Since the fee is in the nature of a penalty, some libraries include it with fines and keep no separate record.

#### **4. Fee for non-resident borrowers**

The registration of non-resident borrowers<sup>1</sup> includes also suggested methods of recording this fee. Many libraries issue a receipt from a stub book which contains a record in duplicate of all the necessary information about the borrower. A copy of this information, with the fee, may be sent separately to the library office, or the fee may be so incorporated in the daily cash and the records kept separate, each as a unit. The reason for this is found in the very nature of the fee. By means of a separate record the library can check the amount of non-resident service demanded and regulate its policies accordingly.

#### **5. Deposit of temporary borrower**

The temporary borrower makes a deposit for the books he takes from the library.<sup>2</sup> This money is held to insure the library against loss and is refunded when the books have been returned, but it is often not counted with other fees since it does not finally belong to the library. The practice of a large number of libraries suggests that the sum deposited by each borrower be placed in an envelope on the back of which is written all the necessary information mentioned in the description of the registration of temporary borrowers. This envelope is kept in a safe place, of easy access. The issue of a receipt may well be combined with this type of record to safeguard both the library and the borrower.

If a stub book is used to record this deposit, it will contain all the necessary information for refunding the money. The deposit

<sup>1</sup>See Chapter 3, p. 62.

<sup>2</sup>See Chapter 3, p. 63.

properly marked is usually sent to the library office with the name, address, date, and deposit number of the borrower, if used. A list of these depositors may be kept in the library office and the record held until the borrower returns his books, signs the receipt given for the deposit and relinquishes his borrower's card, when the money is refunded. The entry on the stub of the deposit book is then canceled, and a full record is placed in the cash drawer to account for the withdrawal of cash. To close the transaction, the borrower's name is crossed off the list in the library office and the borrower's card is destroyed. The receipt is filed in the office as proof that the money has been refunded.

A variation in the method of handling the temporary borrower's fee is found in one library where a regular sum is required for each deposit. This is sent to the library bookkeeper with other cash receipts for deposit in a petty cash account. A check is immediately drawn on this account, bearing a symbolic serial number, in favor of the temporary borrower and signed by the librarian. This check is kept in the circulation department. When the temporary borrower severs his connection with the library, this official check is given him. The check serves as a receipt and reduces the risk of keeping large sums of money accessible to many people.

*In conclusion*, the question of fines and fees is a vital one because through misunderstanding or mishandling, prejudice and ill-feeling may be aroused among readers. All borrowers must be treated impartially by the entire staff, with a declared policy understood by every assistant at the circulation desk. Many a borrower, seeing his plight from *his* point of view only, often finds extenuating circumstances which he feels should call for a remission of charges. Though the library policy may be lenient, fairness and strictness in carrying it out are essential; otherwise more fines would be remitted than paid. It would seem wise for the assistant to consult with the head of the department or a senior assistant before remitting or reducing amounts owing the library.

## VII. BALANCING CASH

The balancing of the cash collected at the circulation desk is usually regularly arranged. If a cash register is used, the balance is generally made each morning and a definite sum left in the register. Should a cash book be used, it may be necessary to balance the book and the cash several times a day, since all records must tally. It is a general practice to remove from the cash drawer each morning all money in excess of a certain stated sum. This is kept in the drawer for the purpose of making change and meeting such emergencies as may arise, for example, the refunding of deposits. The money so removed is taken to the library office with the itemized daily cash statement.

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## THOUGHT QUESTIONS

1. Draw up a set of rules for a library staff to follow in fixing charges for damaged and lost books. Establish in the rules whether or not fines and fees are to be included.
2. What cash items seem to require separate cash records? In a library where no cash register is used, how would you record these items accurately?
3. What difference in penalty would you suggest for a borrower who damages a book and reports it, and one who endeavors to avoid his responsibility for damages?
4. As an assistant at a circulation desk, you will of necessity take part in many discussions of fines and fees. How will you justify the stand you must take while maintaining a fair attitude to both the public and the library? Give specific cases, if possible.
5. What would you say to a borrower who had deliberately kept a popular reserved book overtime with the feeling that the payment of a fine gave him every privilege to keep any book as long as he liked?
6. Outline a system of circulation cash records to be used in a medium-sized library. Give your reasons for your choice of entries.
7. Outline a plan for recording delinquent borrowers. State your reasons for adopting one method for making this record, and for discarding others.
8. What differences are necessary in recording the fees for (a) non-resident and (b) temporary borrowers?
9. Obtain from the library school files several sample forms of first and second overdue notices. After comparing them, draw up a model form for each notice. Would identical forms be useful in large, small and medium-sized libraries? Why?
10. Discuss the relative importance of first and second fine notices. What interval should elapse between the sending of these notices?

11. Plan a system, with the accompanying forms, for the regular use of a messenger to secure the return of overdue books.
12. If a reader loses one volume of a set of books which can be replaced only as a set, what policy would seem fair to follow?
13. After reading Bostwick's Pains and penalties in library work, point out some of the essential differences in old and new library attitudes to fines and losses.

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## CHAPTER 7

### Extension of Library Service

#### I. CITY SYSTEMS

##### 1. Organization of extension work

(a) *Through circulation department*

(b) *Through extension department*

##### 2. Service to extension agencies

(a) *Service to stations*

(b) *Service to branches*

(c) *Service through intra-system loans*

(d) *Social service through books*

#### II. COUNTY UNITS OF SERVICE

#### III. STATE LIBRARY EXTENSION AGENCIES

#### IV. INTER-LIBRARY LOANS

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In every community there are many people who do not come to the library, either for books or for service. These potential users may live at a distance, handicapped by long hours of work, timidity, lack of purpose, or lack of knowledge of the library and what it offers. They may be those of any age who would respond to books and the service which makes their possible use significant, if the idea were interestingly presented to them. Thus as the organization of the library has met adequately the demands made by those who come to it, the idea of extending this service has developed. The use of books to help the individual remove the limitations imposed by isolation, whether it be occupational, geographical, or racial, offers such opportunity to librarians that the problem is attacked from all angles wherever libraries exist. Librarians in large city systems see all about them people of every type who have no connection with the library. In rural communities the potential user may not be at the library door, but his existence is none the less a fact, and his need may be greater by reason of the distance which lies between him and the library.

These are the people whom library extension is designed to reach.

Behind all library extension service, whether it be rendered by a city system, a county library, or a state library extension agency, lies the basic idea that a library's service to its whole community is but a wider application of the principles governing its service to those who come to it.<sup>1</sup>

The wide diversity of problems and variations of procedure arising from local conditions, or influenced by legislation, will suggest to the student that this chapter cannot treat details of procedure with the same fullness found in earlier parts of the book. Only essential functions and distinctive features of each type of library extension will be outlined, and necessary variations in circulation procedure will be described briefly.

The librarian embarking upon any type of extension work will soon see the special needs of this work and relate to these needs his knowledge of the general principles and practices of circulation work. Particular skill and intelligence are required since the librarian must often present ideas as to the value and use of books as well as the books themselves to those who are strangers to both. Library extension work also calls for specialized services to groups, small and large, whose activities and reactions must be analyzed in order to fit books and service to individual and neighborhood interests.

Library extension work in its larger aspects is conducted through four general channels: (1) organized city systems; (2) county systems; (3) state library extension agencies; (4) inter-library loans.

## I. CITY SYSTEMS

### 1. Organization of extension work

The physical features of many American cities have affected the efforts of library systems to distribute opportunity fairly among

<sup>1</sup>For full discussion see *Library extension*. A. L. A. 1926.



all who, through taxation, bear a share in the support of city institutions. In some places more or less sporadic efforts made by individuals or groups to supply a neighborhood with books have aroused the public to a recognition of its need for libraries. In other instances the promptly admitted rights of outlying groups to library service, where contact with books is made easy for all, result in plans for widespread systems of branches. In still other situations the desire for library privileges must be created, often by members of the library staff who go out through scattered districts to make the necessary connections and to fan any flame of interest no matter how feeble.

The organization of extension work in any library system is a local problem, and the procedure required to handle it may be largely governed by the location of the main library, which should focus community demands for books and service, and from which the distribution to distant centers should be made. The commonly accepted agencies by which library extension is usually carried forward are: (a) stations comprising small collections of books sent for an indefinite term to a definite location; (b) sub-branches, which are distributing agencies for larger collections of books, open for longer hours and equipped to supply more complete service than stations; (c) branches, which are fully equipped auxiliary libraries located at a distance from the main library near the business or residence center of the region to be served, and offering service which approximates that of the main library.

*Variations in the organization of extension work* are numerous. All book service to outlying agencies of distribution may be centralized in one independent department, or the work may be assigned to the circulation department, depending on the size and organization of both the book collection and the staff. Wherever it is done, statistics of use must be kept separately as a measure of the service and its acceptance in the various communities. As in other problems of organization, variations must be accepted by the student as indicative of effort to care for new needs in the most

effective manner and with the least possible readjustment in the existing organization. The proper location for any distributing agency should place it within easy reach of the majority of the readers to be served.

(a) *Through circulation department.* Any library of sufficient size to warrant extension work is soon faced with the necessity of devising a procedure to care for this activity. It should be possible for a borrower living anywhere in the territory served by the library to borrow the book he wants through a reasonably close neighborhood point of library contact. This service in its early stages has often been successfully developed through the circulation department. As first calls come from groups living or working at a distance from the main library, the circulation department with its general collection of books selected to suit all types of readers is obviously the department to extend its activities. Thereafter, its book resources must supply not only those readers who present themselves at the main library but also the widely scattered groups which are served through stations.

Unless the general collection has been built to care for the demands of these subsidiary agencies as well as for the normal calls, its resources are soon likely to be spread too thin. Books drawn from the general collection for distribution at stations may be off the shelves for months at a time. Consequently a definite policy should establish at the outset the number of copies of any title to be held for the use of readers at the main library. To send an only or last copy of a book to a station means that although the book appears in the library catalog, the person searching for it has no possible chance of finding it in its place. At the same time those who borrow books through stations should not be limited merely to those books which can be spared from the main library. Through efforts to meet such conditions separate book collections have developed for service to stations, and in some cases to branches.

(b) *Through extension department.* As the use of the library

through stations and other subsidiary agencies grows, advantages will accrue from the organization of this work into a special department. The formation of an adjunct collection built particularly for extension service may be the next step. This collection differs from any other in that it serves primarily as a reservoir from which many small collections are selected for the use of different groups and from which the same demand may be met from several agencies. There will be much careful duplication of popular and standard books. This permanent extension collection can always be supplemented by loans from the general collection to meet both individual and general demands.

All extension work should be so interpreted that the reader grasps the close affiliation between the agency and the main library. The limitations of the smaller collection should be utilized to suggest to him the advantages of further acquaintance with the greater resources and opportunities to be found in the main library. In many cases a trip to the main library may be more advantageous to the borrower than a loan from the central collection. If he is a stranger, a note to a staff member will insure the proper introduction and guidance.

The extension department should be manned by a separate staff qualified to give specialized service. The librarian doing this work needs a thorough acquaintance with the books in this department and their possible uses, supplemented by a knowledge of library resources available for extension use, whether to be found in the main library or branches, juvenile or adult departments. Equally important is a thorough knowledge of the individual communities served. The librarian thus equipped is enabled to link books and prospective readers intelligently.

## **2. Service to extension agencies**

(a) *Service to stations.* A station is a more or less temporary agency from which a small collection of books is distributed to a limited group requesting the service. Two kinds of stations are

commonly found: (1) deposit station; (2) delivery station. Either may comprise a general miscellaneous collection or a group of books selected for a special purpose and may be chosen to meet the needs of children, adults, or both. Stations are placed in schools,<sup>1</sup> settlements, shops, clubs, or community centers, where books will be issued at certain hours of the day or week to people living in the neighborhood. They are also placed in factories, department stores, telephone exchanges, or wherever groups of employees offer the library an opportunity for service. Any station may form the nucleus of a sub-branch and eventually become a branch library.

The assistant in charge of a deposit station may be sent from the circulation or extension department at the main library for certain hours on designated days each week. It is generally accepted that the trained assistant from the library can give more effective service than a volunteer or untrained employee sometimes assigned by the firm or institution in which the station is located. However, in factories where the welfare work is well organized, the welfare worker may take charge of the library, and very satisfactory service often results from this type of volunteer aid. In settlements and schools, social workers may cooperate effectively. The person in charge of the station, whether a volunteer or a library staff member, should know living conditions in the neighborhood in order to be able to fit books to the readers.

The assistant, helping to start a station, may teach the untrained volunteer who may be placed in charge to keep the simple records of use by which the library proves that the station is justified. He may also make some of the introductory neighborhood visits. After the work has been started, the general policy of the library will determine how often the station is to be open; how often a staff member is to be present to supplement the services of the untrained worker; and when the use of the books justifies changing the collection and enlarging its scope.

<sup>1</sup>A book dealing with the question of school library work is announced by the A. L. A. Curriculum Study.

As distinguished from this type of station, there are also *delivery stations*, which keep no books but are visited at regular intervals for the delivery of books previously requested, or to allow the borrower to choose from a small collection brought for this purpose. If orders only are filled, requests are forwarded and the books returned to be called for by the readers. The chief disadvantages of this method are to be found in the lack of possible contact with more than a very few books, or of sustained contact with librarians on the part of the reader. Delivery station service may be carried on by means of a book wagon, or through a system of regular visits by a staff member who takes to playgrounds, schools, or settlements a box of books from which the books may be circulated. A connection may thus be made with readers otherwise without library contact.

The *procedure for charging and discharging* station collections is usually based on the general scheme used by the library, with such variations as are required by the essential differences in the charge. The size of the collection, the books to be included, the intervals between changes, and the method of refreshing the collection of books involve points which will be handled by the administrator, but the assistant may supply suggestions and constructive criticisms as his neighborhood experience grows.

Books intended for circulation at some point other than the main library are usually forwarded, equipped for use with date slip, book card, and book pocket, as described in Chapter 4. If a book card goes with a book, a duplicate book card must be held by the main library indicating the charge to the station, or some other method of tracing must be devised. Two permanent book cards should therefore be supplied each title in the extension collection. These duplicate cards may be of different color or form, with uniform information included on both. The card accompanying the book is commonly so ruled that the charge entered on it may include the date due and name and address of the reader drawing the book, since readers at stations are often not regularly

registered borrowers. Furthermore, it is easier, with a definitely limited group of users, to trace overdues by name rather than by borrower's number. Where collections of any size are to be sent to a station, it is well to use a rubber stamp bearing the name of the station in charging the books to that station. The date of issue and the name of the station are stamped on the book card, which is kept at the library, and on the date slip. The name on the date slip is intended to identify the book with the station to which it is charged. The duplicate book card is left in the pocket of the book. These book cards retained at the library are then arranged in the usual order. In addition, it has been found useful to make a typewritten list in duplicate from the book card of all books sent to the station, arranged by author, title and accession number for fiction, and by call number for non-fiction. One copy of this list accompanies the books, the other is retained by the library. When the collection is to be returned, the list enables the person in charge of the station to check the collection for completeness. It also supplies a check for the library and station in dealing with lost books.

There are numerous ways of *filing book cards* for books charged to stations, depending on the size of the collection, the number of stations maintained, and the frequency with which the collections are changed. A file of book cards arranged without regard to date or the station to which they are charged, offers many advantages. If all fiction appears in one alphabet, arranged by author, title and accession or copy number, and classed books are filed by call number, search for any volume need be made in only one place. Such a file must obviously be supplemented by typed lists of charges to each agency.

In some larger libraries maintaining special extension departments, book cards are filed by groups under the names of stations, although this may be unnecessary if typed lists are made. In still other systems, both book and agency files are considered necessary.

When books are returned from the station, checked with the

list, and slipped, overdue books can be easily traced and listed if necessary. Book cards for these may be marked with a signal, or after repeated unsuccessful efforts to secure the books, may be filed separately behind a special guide.

The evolutionary process, constantly going forward in a live library system, can be demonstrated in the growth and development of these minor agencies for the distribution of books. The station with its total lack of definite form and its flexible book collection offers an ideal medium for experimental purposes. A station may start in a small way, take on new features, merge into new forms, and develop under skilful manipulation and with wide-awake observation. The informal contact possible in station work often enables the library to reach groups which might hesitate to approach the main library. This is particularly true in work with foreign born and with industrial groups struggling against social or educational limitations. The extension department, if broadly administered, has within its grasp the power to build up confidence in the willingness and ability of the library to serve all borrowers alike, and to express the real democracy which lies behind all effective library service.

(b) *Service to branches.* When a neighborhood can no longer be served adequately by a station collection, temporary in character, the demand for a larger service closer to the reader can be answered by establishing a *sub-branch*. This differs essentially from a station in that it has a larger and more permanent book collection, longer hours of opening, and a larger staff. It usually includes a small, permanent group of books for reference and circulation, supplemented by frequent loans selected to meet the definite needs of the group served. The sub-branch is in charge of a member of the library staff, qualified to supplement its resources by those of the whole system. The center of population, relative stability of the neighborhood, and such observations of local conditions as the assistant in any outlying community may make, are the determining factors when the transition from sub-branch to branch is necessary.

In the commonly accepted sense, a *branch library* is an auxiliary unit in a system of libraries having its own permanent collection of books and a permanent staff. The hours of opening approximate those of the main library. Procedure for branch circulation is essentially the same as at the main library. The reasons for uniformity in registration of borrowers, charging system, and borrowers' privileges have been emphasized in previous chapters. Those variations in procedure peculiar to branch routine will be brought out in this chapter. The branch library located in outlying districts or at some distance from the main collection, is the most effective of the agencies for the extension of library service. In many systems the service of the branch to its neighborhood is rendered more prompt and far-reaching by a specially organized system of deliveries made daily or regularly at short intervals between the main library and all branches.

(c) *Service through intra-system loans.* As the numerous types of extension activity grow in number and size, the question of book supply becomes increasingly acute. Intra-branch or intra-system loans become necessary in order to avoid needless duplication of books. The first essential for making possible an exchange of books between two parts of a system is a simple, clear form of request for a book to be sent from the main library to a branch, sub-branch, or station, or from one branch to another. Usually this is a printed or multigraphed form. In process it is filled out in duplicate, one copy to be sent to the main library and the other filed at the borrowing branch. On this form are entered the name of the branch requesting the loan, the author and title of a book or a subject on which some material is required, and the name, address and telephone number of the reader for whom the book is borrowed.

When the main library receives the request from the branch, the first step is to ascertain if the book is in the main library, and if not, where it is in the system. If the book is found, it is charged to the branch by entering on the date slip and the book card the date of issue and the name of the borrowing branch.



The book card is not counted by the regular lending agency, since this count differs from the daily record of circulation to individual readers. A separate file is made of such cards. In a small library a branch file containing all such book cards in regular arrangement may be all that is necessary. In larger libraries it may prove expedient to keep together in regular order all book cards for the books lent to one branch and to file them as a unit. If book cards for short term loans are filed with those for long term loans, some signal should be attached to distinguish them, as an aid in tracing overdue books.

Practice varies as to whether the branch borrowing the book, or the lending agency, makes the duplicate book card on which the book is circulated. In either case, the request slip is inserted in the pocket of the book by the lending agency so that the borrowing agency may at once identify the request. Books are then forwarded for delivery to the branch.

If the book is not available at the main library, the catalog or shelf-list will show the location of copies in other branches of the system. The telephone is often used in finding and securing copies of such books. If no copy is available, the book may be reserved in any branch or station possessing a copy. When a copy is located in a branch the main library usually acts as the clearing house in the transaction. The lending branch charges it to the borrowing branch and forwards it to the main library. There the request slip is inserted, and the book relayed to the branch making the request. If such loans are handled by a separate extension department, a complete record of all transactions is kept there; otherwise, since the charge is from branch to branch, the main library may keep no record. The borrowing branch receiving the book notifies the borrower promptly that it is ready for him. The book card may have accompanied the volume, or it may be made when received, preparatory to charging on the borrower's card when that is presented. Since this circulation has not been heretofore counted, it is included regularly in the statistics for the day at the agency making the charge to the reader.

Such books are slipped as they are returned by the borrower and sent back to the lending agency. If the same volumes are borrowed repeatedly, a file of duplicate book cards may be kept, to save re-writing them. Otherwise they are destroyed when the books are returned. The branch file of requests for intra-system loans must be carefully watched, and if books are not delivered or reported on after a reasonable interval, inquiry should be made in the interest of the borrower.

In libraries where use of special material fluctuates, collections of books are often lent for long terms to branches. A flexible collection is especially useful when neighborhoods change in character, as, for instance, when foreign born or negro populations shift from one part of a city to another. The establishment of industrial plants near a branch may necessitate radical alterations in a collection which can be tried out through loans from other parts of the system, before a permanent change in the character of the collection is made.

In some large systems, *regional branches* are being developed to supply service and books to a wider neighborhood than that usually served by a branch, and are provided with facilities for neighborhood extension and school work. These branches stand in the place of the main library for all smaller branches and distributing agencies in their vicinities. Thus a main library may be freed from responsibility for large definite districts lying at a distance, and community activity may be focused with advantage at a neighborhood center.

(d) *Social service through books. In hospitals.* The therapeutic value of selected books in the hands of experienced librarians has long been widely recognized. Varied attempts at social service among the sick and wounded during the World War demonstrated with peculiar force this effective use for books and gave a new impetus to this phase of library work. Through book service in hospitals of all types and sizes, a particularly interesting opportunity for extension work has developed. *The hospital library* by Edith

Kathleen Jones (Chicago, A. L. A., 1923) includes "articles on hospital library service, organization, administration and book selecting, together with lists of books and periodicals suitable for hospitals." To this the student is referred for a history of the development of this service and for procedure.

A special type of library service is being given in the United States Veterans' Bureau hospitals scattered over this country to care for men crippled in the war. These libraries supply not only recreational reading, but books on trades and professions as well.

During the long hours of enforced idleness which illness makes necessary, books of all types may prove a great boon, and the patient may be taught to use them as a means of escape, not only from dullness but also from pain and depression. Thus the selection of these books calls for especial care and knowledge of books and people, and a genuine realization of what may be achieved from the contact between the librarian in a hospital library and the patient.

The librarian in charge of hospital work should be a person of dignity and maturity, wholesome, healthy, and sound in his outlook on life, since day after day is spent with those who are sick in body and perhaps in mind. This librarian will need a fine spirit of social service, a knowledge of books based on actual reading of the volumes to be distributed, and a quick capacity to fit books to readers whose reactions may not be normal.

A hospital library usually includes a separate collection of books for nurses and medical staff. Such books may be regarded as a special library selected to meet the professional as well as recreational demands of the hospital group.

*In prisons.* Library work in jails and prisons by its very nature presents differences from other types of extension, and the usual variations are found in handling the problems presented. In many large cities, collections established in jails include titles of books carefully selected to suit the conditions of their use, as well as the interests of the readers within certain limits. In some cities the

library is constrained from drawing upon its regular book collection for service to prisons, but a choice is made of books ready for discarding, and those selected are mended and sent permanently to the jails. Through arrangements with the jailer, a staff member may be allowed to distribute books at regular intervals. In state institutions this work is frequently done by the chaplain, who has a chance through this contact to reach men otherwise most difficult to approach. As many prison libraries are assembled largely through gifts, some of them quite inappropriate, particular care must be exercised in the selection of these books for use. The librarian interested in the social opportunity offered through the use of books may find in work with volunteer teachers and chaplains in prisons a unique and inspiring field.

## II. COUNTY UNITS OF SERVICE

As the library's influence widens and spreads beyond the boundaries of the village, town, or city, rural groups coming into touch with its varied efforts awaken to the importance of its contributions. Good roads, the automobile, rural free delivery, the radio and the telephone have removed some of the limitations of country life, enlarging both individual and community interests, and thus creating those needs which books may go far to satisfy. These same improvements may also be the very means of bringing books and libraries closer to farms, to small settlements, and to groups living in isolated localities.

The responsibility for providing library service for people living in the country offers new problems. If organized libraries are to extend their areas of service, areas of support must be broadened at the same time so that the service may be the same wherever it is set up. To accomplish this, special types of legislation may be required authorizing the county or some other accepted unit of service to tax itself, or to contract with libraries already organized. In the the middle west the township has in the past often served as the unit offering wider possibilities of usefulness than the very

small city library. The county unit, however, is now being more generally accepted as offering the best opportunity for conservation of resources looking toward adequate support and effective personal service.

Book service to rural districts is usually provided through library branches and stations varying in size and content, established in villages, at cross-road centers, in schools, clubs, stores, and residences. The system supplying these books may be: (1) a separate library unit maintained by the county, with its own special facilities for distribution, or (2) an established city library organized to extend its service to the whole county through a contract between the county governing body and the public library board. In this case, the right to use any part of the library system is extended to county residents, and in addition branches and stations are established throughout the county.

To maintain the contact between rural users and the center of distribution, and to keep the scattered local collections of books alive, a regular and effective delivery system is essential. Since 1904 book trucks have carried book service to country dwellers. This type of service, started by the Washington County Free Library, Maryland, has developed rapidly. Through the library trucks, which first made trips from door to door, readers have been educated to a point where group service is now more common than visits to individuals. The book truck frequently and regularly augments the value and usefulness of county branches and stations by exchanging collections, and is also the medium for a fine type of publicity.

In considering *records and procedure* adaptable to county libraries, the outline for registration, charging and discharging, used in extension work, should be suggestive. The general principles brought out in preceding chapters will naturally apply. For a compact and admirable presentation of methods of circulation in use in county libraries, as well as the history and description of this work, the student is referred to Long, H. C., *County library service* (Chicago, A. L. A. 1925).

## III. STATE LIBRARY EXTENSION AGENCIES

"State-wide library service is the function of a state library extension agency. It aids in establishing local and county libraries and developing existing libraries. It supplements their book collections from its larger resources. It gives direct book service to communities, groups and individuals until adequate local library service is established. It often advises or supervises school and institution libraries. It sets up a program for the library development of the state. Without such leadership library progress is slow and haphazard."<sup>1</sup>

There are found in various states three main types of state agencies organized to give extension service to readers living within the territory they are designed to serve. These are: (1) the *library commission*, usually composed of several members appointed by the governor for long terms, expiring in rotation to avoid partisan control. The executive secretary of this commission, usually a librarian, and the necessary staff are appointed by the commission. (2) A *state library*, or state library department, where all state library activities are centralized. A non-partisan library board should have the direction of this library and appoint the state librarian for an indefinite term. (3) The *state department of education* which unites all educational extension activities, including library extension work. The latter should be under the direction of a library commission or committee with sufficient special knowledge of library affairs to give the work a wide scope. Whatever the organization, the state library extension agency should stand in somewhat the same relation to other libraries in the state as the main library in a city system—a central distributing point for book resources, a clearing house for all library extension activities.

The service given by state library extension agencies includes the loan of one book or collections of books to any individual

<sup>1</sup>Library extension, p. 51.

reader or groups living within the boundaries to be served. These collections may take the form of traveling libraries sent by request to clubs or schools, or other groups not served by a public library. This service is conducted by mail, express, or freight, yet the tendency is to prefer mail even in sending out collections. As the demand for books increases, it becomes essential to simplify this work because small staffs are usually provided. Registration is reduced to a minimum. The individual desiring to borrow from the agency may not be required to register at all. Application cards for groups of readers are, however, usually signed by two or three officers or other responsible people. This application card is usually specially constructed, and may serve in some places as a charging record as well, indicating for each collection sent: (1) what was sent, i. e., the number of volumes, or symbol or box number if traveling library was shipped; (2) how it was sent, whether by mail, prepaid, or by express or by book truck; (3) when it was sent, i.e., date of issue; (4) when it was returned, i.e., date of return. These application cards are generally filed first under name of place and next by name of group.

Transportation charges both ways and drayage may be collected; or, as is the practice in some state library extension agencies, a small fixed amount may be required in advance. However, there is a tendency in this work to abandon the elaborate machinery required to keep accurate records of postage due by collecting no transportation charges at all. The cost of keeping such records often exceeds the cost of prepaying the delivery of books, and the borrower's appreciation adds to the profit of eliminating them.

The *selection of books* for traveling libraries involves a much discussed problem. Are these libraries to be *fixed collections*, whether general or on specific topics? Or, shall a *special collection* be selected for each request, to meet the express needs of the group wishing to use it? Or, shall prepared lists be sent to groups to be checked and returned? The group of books selected

specially to meet each request is generally accepted as the most satisfactory method since it approximates more nearly the individual choice of books. A compromise is effectively achieved in some places where small unit collections are assembled to suit the tastes of certain types of readers, e. g., children, teachers, high school pupils, clubwomen, etc. These units are kept intact, and an appropriate collection of units may be made to meet the needs of a group. However, single volumes, specially needed, should supplement these fixed collections.

To *charge a traveling library* to a group of borrowers, the date of issue is usually stamped on the date slip and the book card of each volume, and the name of the group or organization, and the place are entered on the book cards. From these cards, arranged in order, a list of the books sent is typed in duplicate. One copy accompanies the collection, and the other is filed under the name of the town. The book cards for each collection are kept together, filed as a unit under the date by the name of the place. A copy of the printed rules for circulation, stamped with the date due, accompanies the collection. The period of loan to a group varies from three months to a year. Charges to schools are usually for the term of the school year. A duplicate book card accompanies each book, to be used in charging it to readers. Pictures, pamphlets, magazines, stereoscopes, lantern slides and other material may be sent with traveling libraries, accompanied by the usual records needed to circulate this type of material. When the traveling library is returned it is discharged by checking the typed list and slipping the books to see that everything has been returned. The books are also inspected for needed repairs and finally shelved by call number or as units ready for further use.

*Charges to individuals.* It is a general policy of state library extension agencies to lend books to individual borrowers through local libraries whenever possible. Yet the majority of these loans are still made directly to individuals living outside of library service areas. The term of loan is usually four weeks. The rec-



ords are kept simple and workable. The letter making request may be regarded as the record of the transaction and filed geographically. Book cards are usually filed in regular order by date, or in one file by author or class number.

*Overdue books* and collections are discovered by searching the files. Post-card forms call attention to overdues, and follow-up notices are also sent. The interval elapsing prior to a first notice is longer than in public library procedure, often being two weeks or a month after a collection is due. No fines are charged for overdue books. In cases of flagrant carelessness a note is entered on the application card and other records, and further service may be refused, though this is resorted to only in extreme cases.

Renewal is usually granted for books or traveling libraries upon request. This is accomplished by changing the dates on the records and filing them under the new or original date. Reserves are handled in the same way as in public libraries and are sent by mail to readers. In case of need, books are borrowed through inter-library loan from other libraries to meet an individual request.

Differences in the problems confronting state library extension agencies may be suggested when the economic and social differences of states are considered. Hence variations are numerous not only in procedure but in the types of work done. Direct efforts in behalf of local communities may well be the origin of town or village libraries. From these same efforts may spring county library systems which state agencies regularly promote. A relinquishing of the responsibility for library activities to local groups rather than a long continuance of the aid provided by state agencies should be the outcome of this cooperation.

#### IV. INTER-LIBRARY LOANS

In an effort to supply readers with books and periodicals which cannot be found in local libraries, inter-library loans have been

utilized with great advantage to individual readers and to libraries. The chief purpose of these loans is to provide for the unusual need of the student. Libraries ordinarily lend material which would not be normally available in the library requesting the loan, and books which can be spared. Books, maps, and manuscripts of great value and rarity are often denied because of the impossibility of replacement.

The librarian needing to borrow books, periodicals, or other material must have wide acquaintance with library resources. State library extension agencies usually answer the first call, and should serve as the clearing house for requests. Where more specialized service is required, aid may be asked of the great collections, especially the federal libraries in Washington. Definite rules governing inter-library loans have been formulated and the library seeking this service should conform to these requirements.<sup>1</sup> The building of union catalogs indexing special libraries, or several libraries in one locality, for one subject or type of material has lent great importance to inter-library loans. The completion of such tools as the Union List of Serials in the United States and Canada will make possible a most effective service through inter-library loans.

In order to systematize procedure and fix responsibility, the borrowing library acts as intermediary between the lending library and the individual requesting the book, and must also be responsible for the return of the book. The request sent to another library should be in definite form, giving as complete and accurate bibliographic references as can be supplied. The author's full name and the date of publication will always save much time in tracing material in large collections.

If the library receiving the request for a loan cannot supply the book, a report should be made at the earliest possible date. In the lending library the call number is usually entered on the request

<sup>1</sup>A. L. A. Survey of libraries in the United States, v. 2: 223-29.

slip or letter preliminary to searching for the books wanted. The letter is later filed under the name of the borrowing library. The book is charged by stamping the date and entering on the book card the name and address of the borrowing library. In some cases the name of the librarian is also entered. Books thus lent are usually sent by express collect; if sent by mail, a bill for the amount of postage is forwarded separately. If the library has a separate shipping department or its equivalent, full directions for mailing must be attached to each volume. When possible, libraries are liberal in granting a renewal for an inter-library loan, some providing for automatic renewals. If many books are thus lent, special printed forms calling attention to overdue books may be sent, or the overdue notices used locally may serve the purpose. A minimum of effort should be required of the lending library, for which this whole process is simplified if the book is returned within the time allotted.

The receipt of the borrowed book is recorded frequently in a notebook. This entry consists of a rough note of the author and title of book, the date received and the date it is to be returned, and the name and telephone number of the reader for whom it has been secured. The borrowing library is responsible for all carriage charges and insurance, but the reader himself usually refunds these charges on books obtained for his use. The procedure for circulating a book received on inter-library loan is basically the same as that for intra-system loans or other special material. A special book card is made for the charge to the borrower and the book is charged and discharged as are other books. The borrowing library should take especial care to return the volume promptly and in the safest way possible, carefully wrapped and insured. A letter usually reports the return of the book, and if the postage due has not been previously paid, it is enclosed with this letter. On receipt of the volume, the lending library usually sends acknowledgment on a simple post-card form, and thus the transaction is closed.

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### THOUGHT QUESTIONS

1. What are some of the differences in the demands made on an assistant engaged in county and in city library work?
2. Make a list of service objectives for the guidance of a county librarian. How does this service appeal to you? Give reasons.
3. In a library system endeavoring to express unity and service through all its agencies, how may the intra-system loan become an important and effective branch of the service? Outline a simple and expeditious changing system for use in intra-system loans in a medium-sized library.
4. What are the variations which seem necessary in adapting a regular charging system for use in a small deposit station? Explain reasons for these variations.
5. Under what conditions may the organization of intra-system loans provide for the return of books to any agency in the system regardless of the point of original loan? Do you think the advantages of this service are worth its maintenance cost?
6. Discuss the methods of securing the return of overdue books:
  - (a) in a station,
  - (b) in a central library for a book on intra-system loan to a branch.
7. Point out some essential differences in the circulation work, (a) in a small branch library with only one assistant, and (b) in the circulation department of a central library of about 75,000 volumes.

8. Outline the major steps in the expansion of a small library, beginning with no branch or extension work, into a city system with a wide range of extension service. Indicate the shifting of centers of administration for this developing extension work and show points where the control may fork in two alternate directions.
9. Discuss the advantages and disadvantages of extension work conducted through the circulation department in (a) small library; (b) medium-sized library; (c) large library.
10. Discuss the question of inter-library loans. When is a library justified in making a request for an inter-library loan? When would a library be justified in refusing a loan?
11. Write 300 words on the opportunities to be found in taking books to groups:
  - (a) in hospitals,
  - (b) in jails and prisons.Would this work interest you? Why?

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## CHAPTER 8

### Special Services to Readers

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| I. GENERAL ADVISORY FUNCTION OF CIRCULATION WORK | 3. Readers' advisory service                       |
|  | (a) <i>Location and equipment</i>                  |
| II. INFORMATION DESK                             | (b) <i>Contact with readers</i>                    |
| 1. Location and organization                     | (c) <i>Records</i>                                 |
| 2. Personnel and service                         | (d) <i>Reading courses and lists</i>               |
| III. ADULT EDUCATION AND THE LIBRARY             | (e) <i>Book supply</i>                             |
| 1. Scope and definition                          | (f) <i>Cooperation within the library</i>          |
| 2. Opportunities for library service             | 4. Local adult education opportunities             |
|  | 5. Cooperation with other adult education agencies |
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The scope of public library service has spread so rapidly that it seems but a short step from a simple organization of the last generation to a complex institution reaching out for every possible relation to community life, equipped to meet new calls and to create needs for resources, which may be thus more fully used. But the step is not short. Librarians with imagination are questioning traditional limitations, are regarding critically their whole field of activity with an insistence that promises a revaluation of numerous phases of library work. Many of the movements toward progress have developed through the recognition of the significance of personal relations between readers and librarians. These new ideals have gradually permeated the whole organization. Librarians are feeling their way as best they can, pausing at intervals to be sure of purpose, to restate aims and to unify practices.



## I. GENERAL ADVISORY FUNCTION OF CIRCULATION WORK

The function of the public library is not primarily the circulation of books but rather the dissemination of ideas, the advancement of learning. This goal, phrased in one way or another, is probably set and worked toward by every library staff, whatever its size or character, through continuous personal assistance tendered to the men and women who turn to the library for information and suggestion. The library cannot fail to have a definite cultural effect on individual and community interests if, in addition to its collection of books, it has a staff with a knowledge of local conditions, qualified to carry forward its work consistently, to make books easily accessible and to supply that introductory guidance to their use on which may depend the reader's future relation to the institution. In the ordinary course of events the library functioning normally has always contributed to the education of the adult through a service which has been without name and without separate identity. This service has been rendered in finding the book or the information wanted, in offering intelligent help of a sort which shows thought and a comprehensive grasp of the readers' aims; in displaying the ability to elaborate tactfully a slight point of contact. Much of this advisory service has naturally fallen to the circulation department from which a conscious though unspoken invitation is broadcast to all within reach. The very nature of the personal touch here possible with people, its informality offering opportunities for friendly acquaintance based on interests of wide variety, clears the way for any request which the reader wishes to make, as well as for many kinds of professional assistance which the librarian may give.

From the relatively recent recognition of these facts is developing a new type of service in public libraries. Calls for assistance in libraries, large or small, based on a need for guidance in the

selection of reading are most often made in the circulation department and the books and material used by these readers are usually found and issued there. This more or less *informal advisory service* may with justification be expected by readers applying at the circulation desk. The reader wanting actual guidance, or those, more numerous, wanting only a friendly word of advice to weight the scales in making a decision, should find it without search.

The advisory work falling to the lot of the intelligent member of the circulation staff has often proved the most stimulating and interesting of his library duties and has been carried on with enthusiasm, ingenuity, and profit to both readers and library. As reader has followed reader, the assistant moving rapidly from one call to another has not stopped to classify the service given. His easy approachableness has attracted queries, and those requests which could be met without the expenditure of undue time and too lengthy search have been handled in the circulation department. It is this service that lends dignity to circulation work, that distinguishes it from the mere performance of routine clerical duties, and that suggests forcibly and frequently to the reader the library's willingness and ability to be all things to all men.

## II. INFORMATION DESK

At every busy circulation desk there is usually a steadily increasing pressure caused by constant demands on the part of readers for information, direction and aid. Recurring questions, asked many times in the day, often can be most simply answered at the first point of contact. Because of this fact many libraries have organized information desks and placed them prominently so that appeal is obviously suggested to the borrower early in his transaction.

### 1. Location and organization

The information desk is most commonly regarded as an adjunct of the circulation department, manned by regular staff members

scheduled to this post of duty. In some libraries a special assistant gives full time to this work with such additional help from the general circulation staff as may be needed. Work which can be dropped readily is usually planned for this staff, to be done during slack periods.

The questions most often answered at the information desk relate to: (1) the direction of readers to different parts of the library, and the supplying of general information about the library or the city; (2) instruction to new borrowers in the use of the library, particularly in the use of the catalog and lists as aids in the choice of books; (3) the distribution of printed or multi-graphed lists, bulletins, announcements, etc.; (4) simple reference queries, involving a minimum amount of search and answered usually from the ready reference tools at hand, or from books in the circulation department. Questions which involve more intensive search may not fall within those flexible limits, and are referred to the reference departments or other sources where they can be most efficiently answered.

The aids equipping a majority of information desks are few in number. These books must lend themselves to quick reference use of a general nature and must be used frequently to justify inclusion. They usually include city and telephone directories, guides to points of local interest, lists, bibliographies, indexes and a few general ready reference tools, such as almanacs and year-books. In some systems indexes of club meetings in the library and in the city are kept at this desk as well as year-books of clubs and lists of club officers.

## **2. Personnel and service**

The assistant assigned to duty at the information desk should be a staff member of experience, knowing the library thoroughly as a whole. A retentive, associative memory is an asset here, as well as a genuine interest in the city, its commercial, industrial, cultural and educational activities. Since quick, sound judgment is often

needed to meet the frequently recurring emergencies of this service, the assistant should have sufficient maturity to assure breadth of personal as well as professional experience, and the best educational training available. Special interests attach to this work, calling for a particular type of understanding, patience and imagination. Many people, in no sense regular readers, may search out this desk because of the trustworthy character of the information they may secure.

A grasp of the scope and necessary limitations of the service at the information desk will guide the assistant in deciding when questions must be referred elsewhere. The power to resist the temptation which lures the assistant beyond the elementary search presupposed in this service must be cultivated early and reinforced constantly. Congestion may arise at this desk and necessitate a facility to do several things at once without flurry, and the ability to turn quickly and easily from one topic to another. Much telephone service may be given from this point and the ability to refer requests intelligently stands the assistant in good stead.

No uniform way of handling the routine duties of the information desk has been devised, nor is there even commonly accepted opinion as to what those duties should include. Any book or tool that will facilitate the answering of the questions locally relegated to this service may be regarded as a necessary part of the desk equipment. Ingenuity will suggest methods of accumulating and making available information repeatedly requested. Vertical and card files lend themselves readily to such purposes, and the information desk is justified in appropriating to its own uses any specialized technique to be found anywhere which suggests quick and accurate results.

By a display of ready interest and courtesy the assistant at the information desk has the opportunity to stress the idea of personal guidance to the reader early in his connection with the library. Peculiar significance is thus added to the work at this desk, and further variety is introduced into those duties which may be performed *pro bono publico* by the circulation department.

### III. ADULT EDUCATION AND THE LIBRARY

Much research and inquiry have lately been centered upon the more or less indefinite strivings which have always characterized the efforts of individuals and groups to enlarge the vision of life, the scope of understanding. These general and as yet not clearly defined efforts have come to be spoken of as adult education, a term only partially descriptive. In recognition of the scattered attempts being made by organizations of varying degrees of fitness to further the efforts of individuals, the Carnegie Corporation of New York has made a study of adult education in the United States which has resulted in the formation of the American Association for Adult Education. The American Library Association has also attacked this problem by appointing a commission "to study the adult education movement and the work of libraries for adults and for older boys and girls out of school." The report of the Commission on the Library and Adult Education<sup>1</sup> attempts "to assemble and describe these disconnected services, and to coordinate them into a definite, workable plan or program."

For the purposes of this book adult education will be considered entirely in its relation to the public library. The new recognition of old effort and the endeavor through broad, careful analysis to discover the relation of the library to this activity are beginning to show results. Findings indicate that the library's ability to aid in the voluntary search for knowledge is linked closely with both circulation and reference departments. However, contacts with adult readers desiring educational service come chiefly through the circulation department because of its peculiar fitness for supplying guidance to books as well as the books themselves. At the circulation desk all varieties of books are most easily accessible; here are made the initial and repeated contacts, and here may be secured the books wanted for study or use at home.

The subject of adult education and the development of this work as a unit in the circulation department, or as a separate de-

<sup>1</sup>American Library Association. Libraries and adult education. Macmillan, 1926.

partment growing out of increasing demands for the special service, will be outlined as follows: (1) scope and definition; (2) opportunities for library service; (3) readers' advisory service; (4) local adult education opportunities; (5) cooperation with other adult education agencies.

### 1. Scope and definition

In order to understand what is meant by the term adult education and to formulate an intelligent idea of its relation to the library, it is necessary at the beginning to endeavor to define it. "It is the process of learning on the initiative of the individual, seriously and consecutively undertaken as a supplement to some primary occupation."<sup>1</sup> Or, further, "The aim of adult education is to inspire grown-ups to be something more than they are now and to do their work better than they now do it. Its beginning is wherever one finds one's self; it ends only when ambition ceases to function. At its best it leads to constantly increasing richness of life, better appreciation of what life offers, greater satisfaction in the use of mind and body and better understanding of the rights and duties of one's fellow men."<sup>2</sup> "It will be sufficient for the present purpose to refer to adult education as representing the deliberate efforts by which men and women seek to grow in knowledge after the period of formal schooling has ended."<sup>3</sup> In every sense it is voluntary, free from all idea of grading or credit, and appeals to those who desire better educational equipment whether they be young or old.

The place of the library in adult education presupposes a broad point of view. Its effort is based on the recognition of the fact that adult education is a lifelong process and its pursuit necessary not only to those who have been denied its formal advantages in youth but also to most men and women including university graduates. Growth in knowledge and understanding comes as

<sup>1</sup>Keppel, F. P. Education for adults. *Yale Review*, N. S. 15:417-32, April, 1926.

<sup>2</sup>Russell, J. E. Help to self-realization. *Survey* 65: 544, Feb. 15, 1926.

<sup>3</sup>American Library Association. *Libraries and adult education*. Macmillan, 1926.

the result of inspiration, effort, training and experience. The real development of the adult individual lies largely in his own hands and results from continued activity throughout life.

Much progress is possible through independent reading carried on without organized guidance. Much more may be accomplished through thoughtful, systematized reading, and for this reason reading courses are particularly useful when compiled to meet the borrower's needs and tastes, with due consideration for his age, occupation, his previous education and experience. Beyond this, in most communities, there are many opportunities for lecture courses, class work, clubs or discussion groups. By its direct connection with all such activities, the library is often able to furnish its readers means for consecutive study, or to give reliable information concerning local educational opportunities. In addition, through service rendered to the leaders responsible for the conduct of classes or discussion groups, the library should be able to make connections which reach beyond the individuals assisted.

## **2. Opportunities for library service**

The beginning of concerted effort to coordinate and centralize those means within the library which enable it to take its share of community responsibility for adult education has brought a new realization of its resources and their possible uses. The library offers a natural source of assistance since books are essential for education, and the duty of making them easily available rests logically upon librarians. Educators as well as librarians are admitting this fact, hence opportunities are being enlarged and the scope of the library's usefulness is spreading in every direction. To the individual wishing to study alone, the library offers aid in the choice of subject and selection of books. It may be necessary to supply the initial guidance in the use of the very books selected. To the group or class taking part-time instruction in places often at a distance from the source of the book supply, a different type of service may be rendered, which will be treated later.

The type of assistance supplied by the circulation staff member assigned to duty at a desk or on the floor is recognized as offering the initial opportunity for successful contact from which, through constructive direction, the reader may proceed to consecutive or more purposeful reading. This direction and guidance adapted to the reader's capacity and desires may secure results entirely advantageous to the individual when compared with the opportunities offered by correspondence schools and other similar commercial agencies which can give no personal guidance. With the general recognition of the possible function of the library in forwarding education for those out of touch with schools and colleges, whether they be working alone or assembled in groups, has arisen a desire to pool the information gained through scattered experience, and to utilize and adapt all the suggestive methods and procedure which have resulted.

A sense of the individual differences in people and a respect for the right of each reader to follow his own tastes will point the danger of permitting a tendency to develop in the library to classify people in groups, or to attempt to standardize methods of fitting books to readers. The same menace may lie in the use of "ready-made" courses not adapted to the needs of the individual reader.

The *selection of books* for use with those wishing to follow a constructive course of reading involves much expert skill. Libraries have on their shelves the history of human progress, the development of the practices of civilization resulting from the organization of human knowledge. But the form in which this tale of the intellectual achievements of man is told has much to do with the reader's response and interest in it. And libraries today, endeavoring to spread the knowledge of history and science, sociology and philosophy, or the fine arts, are tremendously handicapped by the difficulty of finding good books written from the proper point of view. These books must be accurate and sound without being unduly technical. Their choice is usually influenced by the hope that through their interest they will lead the way to



further reading. At the same time, the dangers of supplying borrowers expecting guidance with superficial, popularly written, so-called treatises can never be overlooked. A hard-won connection may thus be very easily lost. With the increasing need for simple, direct, accurate, readable and inspiring books in all fields of knowledge, the whole staff of any library, particularly the catalog, reference and circulation departments, may cooperate effectively in accumulating material useful in this work. In the daily use of the library, discoveries of such books should be noted and suggestions found in notices and reviews should be investigated. A close survey of new books is also important in this search for material. Authors are being urged to meet these demands for "humanized" readable books which may attract those who have lost the habit of reading, or those who are unaccustomed to the use of books. When such titles are found, the library will probably feel that reasonable duplication of this material is justified to meet the created or spontaneous demand.

The administrator feeling the need for this special service will appreciate the fact that the library owes to these readers its best attention and its most skilled service. In order to carry forward this experiment for the benefit of the public and the library, the carefully chosen assistant assigned to this responsibility will be one with sufficient vision to see its possibilities for growth and with judgment to draw correct deductions from what is observed. For a description of various experiments being made in libraries of different sizes and types endeavoring to further adult education activities, the student is referred to American Library Association, *Libraries and adult education*, Macmillan, 1926, p. 221-48, and to current numbers of *Adult Education and the Library*.

### 3. Readers' advisory service

When the public demand for self-education through organized reading becomes sufficiently evident, personal advice from a qualified member of the staff is a basic requirement. The tendency is to delegate this personal guidance of reading to a librarian,

with the necessary assistants, who is often called the readers' adviser. Whatever the local development of procedure certain general functions are ordinarily carried on by readers' advisers: (a) interesting the more or less casual inquirer in more systematic reading; (b) analyzing his reading problems; (c) selecting the books adapted to his needs, purpose, and ability, and organizing them into a carefully planned course; (d) making a record of the results of interviews, the books selected and of the reading completed; (e) seeing that the books recommended are promptly available when needed by the reader; (f) maintaining a friendly contact with the reader so that his continuing interest may be assured and the course varied if developments indicate that a change is necessary; and (g) maintaining close touch with all local agencies looking toward adult education, for the double purpose of supplying information requested by readers, and aiding and furthering the work undertaken by such agencies.

The separate duties of the position have been so recently recognized that the technique to be used must be developed almost entirely to suit the local organization. Though a particularly designated staff does the specific work connected with adult education, the general advisory service to readers wanting the most expert service to be found should not be curtailed or limited. The work done by the readers' adviser in preparation for his special assignment will add to his value to the public. The methods usually employed are equally applicable to those borrowers wishing consecutive reading and to those wishing less formal and definite directions who nevertheless accept expert suggestions gratefully. This gives a distinct advantage to the assistants who while doing the regular work of the circulation department can maintain a close touch with the more highly specialized work done by the readers' adviser.

The person chosen to organize this service will need all the essential *qualifications*, special training and experience required by the unusually successful circulation assistant. In addition, a further vision and a deeper knowledge and understanding of human

psychology are required; first in interviewing the reader, determining what he wants and why he wants it, as well as getting him to disclose his past experience, his training and background; and next in selecting and assembling suitable books and material for him. From the outset the essential differences in this work and the other work done in the library will be grasped by the assistant who sees the advantages which may result from the employment of the indirect method of teaching, without thought of formal standards. This assistant needs to be particularly alert, not only conscious of the resources in the books in the library, but also aware of the personal resources which can be summoned for aid from each member of the staff. And beyond that he should know community resources. If the service and its scope are grasped by those interested in education and the readers' adviser knows where to turn, experts and specialists will be glad to cooperate and to place their knowledge at the disposal of the library.

(a) *Location and equipment.* The work of the readers' adviser has been taken care of in different places within the organization of different libraries. Where the talent lies for meeting the new situation, there the administration is likely to assign the new duties as they develop. In some libraries, the work of the readers' adviser has been connected with the reference department. In others a special department has been created. In still others this work has been developed in connection with the circulation department because of the natural evolution of such service from the informal advisory work done at any circulation desk, as pointed out earlier in this chapter. Here it has been necessary to make special provision for this service since the general assistant, moving rapidly from one borrower to another, has found it impossible to give to the individual reader the time and thought necessary to analyze and understand his particular problem and to help him organize his reading in such a manner that he will gain his objective with the least possible expenditure of time and energy. It is obviously impossible for the general assistant to follow up the contact, check its success, or alter suggestions as a result of further observation.

All this requires unhurried conferences between the adviser and the reader and a friendly interest which encourages the reader to return to the library.

(b) *Contact with readers.* The reader requiring the services of the readers' adviser is not one who is satisfied with what exists, or who, at best, is superficially dissatisfied and easy to appease. Roughly speaking, the readers' adviser meets the discontented person, that reader whose healthy dissatisfaction with himself is sufficiently definite to impel him to do something to remedy it, and to improve the condition which causes it. The readers' adviser also may meet and help those readers who attach perhaps exaggerated importance to formal training not achieved in youth, or to those attributes of the mind which they lack. Many of these people are handicapped through not having acquired a reading habit in youth or through having lost it. Without knowing what is wrong, they are conscious of a deficiency and are timid, reluctant and often ashamed to ask for help that they think other adults may not need. Subtle, diplomatic methods are here called for, and sympathy which must occasionally be curbed by firm restraint.

*Interviewing.* The assistant endeavoring to make a successful contact usually begins his questions in an informal way. The reader must be drawn out and induced to talk if he shows any hesitancy. To discover his needs and capacities, his background and education, any line of questioning which suggests itself may be followed. It is well to avoid asking directly when a reader stopped going to school, though if he volunteers this information much help will be gleaned from the tale that is told. Especially helpful will be an account of any efforts made to continue formal education through night school or other agencies.

In many cases a reader asks for a reading course on a broad general subject, such as psychology or sociology, instead of a more limited subject which would actually meet his needs. His purpose, whether practical or theoretical, may suggest the necessary limitation to be placed on the subject matter. The reader's reaction to

a prepared list may be enlightening, and inquiry concerning previous reading may yield suggestive information. The time the reader expects to give to his reading and the regularity with which he plans to do his work must be ascertained. To secure all this necessary information the readers' adviser must be tactful, friendly and unhurried.

*Maintaining the contact.* The readers' adviser will make every reasonable effort to maintain the contact with the reader who has shown enough interest to ask for guidance. As books are returned, further informal conference with readers is usually essential though this discussion must in no sense resemble an examination or quiz as to how the books have been used. From the reader's comments, it should be easy to tell whether or not the selections made are suited to his wants. If the reader shows signs of lagging by the way or of discontinuing a course, tact must be used in giving him an opportunity to tell why this is so. Thus he may be called on the telephone and asked if he is ready for the next book. No hint of pursuit must be conveyed but the contact must be maintained as long as the borrower for whose benefit it has been made wishes to continue it.

*Reaching young people.* Among the readers met by the readers' adviser none demand more skilful handling than the older boys and girls just out of school. If a well grounded reading habit has been started in school, as should be the case, these young people may turn naturally to the library for the help and guidance to which they have been accustomed. No activity within the library seems more urgent than reaching out and retaining for purposes of self-development these younger readers who are released too early from training in the schools. The difficulty of maintaining this touch calls for the closest cooperation between schools, social and industrial organizations, and libraries, and the most skilful selection of books. If, through contact with the library and its books, the minds of young people can be kept open, eager, and appreciative of the opportunities about them, the problems of adult education in the next few years may be less complicated and the

relation between the library and the reader may be more easily maintained on the plane toward which librarians are aiming.

(c) *Records.* The routine for maintaining readers' advisory service should require of the reader only the barest necessities so far as library records are concerned. All borrowers regularly registered may request this service. In addition to the usual registration records, or as a substitute for them, a special separate record for each reader is often felt to be necessary. For this purpose a card form has been devised to be filled in by the librarian each time a reader consults him. Actual practice has found it essential to keep a duplicate file of borrowers' numbers for tracing overdue books. A specially devised borrower's card is often used in drawing books circulated by the readers' adviser. Extreme liberality as to the period of loan is customary. Since separate statistics of the work done must be compiled, all the usual records of circulation are kept.

(d) *Reading courses and lists.* The generally accepted meaning of the term reading course is a list of books including a very limited number of titles, each of which supplements the other and all of which are arranged to make a more or less complete presentation of a subject as a whole. Progression is indicated. These courses are made in many ways, depending on the subject and the ingenuity and resourcefulness of the readers' adviser and his knowledge of the books and materials to be used as tools. Each book selected for inclusion should be carefully examined and measured by the standards of the borrower who will read it. A brief summary or definition of the subject, informal and simple in tone and phrasing, may head the course, and a short annotation framed to enlighten the reader is usually included for each title. A copy of such a course is kept at the library for reference and checked to indicate progress. When completed, the course should be filed for future use and adaptation to the needs of others.<sup>1</sup>

<sup>1</sup>For a full treatment of reading courses, what they are, how they are made and how used, see American Library Association. *Libraries and adult education*. Macmillan, 1926. p. 31-38; 249-66.

(e) *Book supply.* When a library agrees to furnish advisory service to those who wish guidance in consecutive study, there is presupposed an ability to supply each reader with the book he needs without delay. This means that an adequate supply of books required will always be kept available. Considerable duplication of titles may thus be necessary since a book included in reading courses is generally withdrawn from circulation in advance of the date on which it is to be given the reader. Many libraries using published series of reading courses with large numbers of readers, buy a definite number of the titles included in each course for general circulation and duplicate them as required for readers registering for the courses. When the urgent call for these titles ceases they can profitably be absorbed in any general collection.

(f) *Cooperation within the library.* Some large libraries are organized into departments or divisions according to subjects, such as technology, with specialists in charge. With these specialists the readers' adviser may cooperate when the borrower wishes to read in these particular fields. In such libraries the attendant at the information desk or the readers' adviser often leads the reader to the proper place for this specialized assistance. In other libraries there is a tendency to focus all matters of policy pertaining to educational activities in the system in the hands of an educational director. This may be a person with library and teaching experience, one qualified to stand for the library in educational activities in the community and by successful contacts in large ways to broaden the library's field of usefulness.

While emphasis has been placed on the work of assistants especially assigned to the organization and development of the educational work of the library, it cannot be too forcibly stated that the whole library and the entire staff are involved. When present-day practices are examined carefully it will be clear that instead of detracting from the importance of the work of other staff members with the public, the readers' advisory service extends the influence of all of the most capable personnel of the library, and this regardless of the department in which they are located, by

bringing their special knowledge more specifically to the aid of readers and by bringing them into closer and more personal relationships with the public.

#### **4. Local adult education opportunities**

With a view to answering the queries of those individuals who wish opportunities for study outside the library, a reliable and completely accurate information service should be maintained. Details regarding all educational and cultural activities for adults to be found in the community should be easily accessible. This information may be kept in the form of a card index giving the facts in sufficient detail to enable the readers' adviser to answer intelligently and specifically the questions of readers. The index must be carefully and frequently revised to be kept alive, since changes in the personnel and alterations in requirements may occur at short intervals. A thorough familiarity with the actual happenings in these various agencies may help the readers' adviser to cooperate effectively. By focusing at the library information concerning all such activities the library is enabled to extend its service to all groups thus known.<sup>1</sup>

This service, in some library systems, is regarded as a part of the general information supplied at the information desk, and it may represent the library's first step in the development of advisory service. To this desk come the more casual as well as the regular users of the library, and those desiring class work or group work or lecture courses may naturally ask here for authoritative suggestion. As the educational work of the library becomes more extended and more highly organized, it is possible that this activity may center in a special department.

#### **5. Cooperation with other adult education agencies**

No class of potential readers so much needs ready access to the resources of the library, or will make better use of those resources,

<sup>1</sup>For details of methods and records, see American Library Association. *Libraries and adult education*. Macmillan, 1926. p. 39-40.



than those serious-minded persons who are enrolled in the various agencies offering part-time instruction to adults, or those clubs and similar groups whose members meet to discuss an unlimited number of topics. The library can well afford to make a special effort to reach all of these persons.

When such groups can be drawn to the library for meetings a close relationship between them and the library can be easily maintained. Where this is not possible it would generally prove advantageous to deposit a collection of circulating books for the use of the classes at their meeting places. The presence of the books automatically inspires interest and invites inspection, while their accessibility makes it easy for the student to obtain books for home use and to pursue his subject more successfully than he could otherwise. If a library representative can attend these meetings regularly or irregularly, the result will be a better use of the books deposited and familiarity on the part of the library with the book needs of such classes. If the members can also be induced to visit the library *en masse* they can be effectively introduced to other services which the library has to offer. Borrowers registered from such groups find connection with the library which may be followed with advantage long after classes are over. Such possibilities of development and growth stir the imagination of the librarian, keep alive faith in the value of things of the mind, and also make work with books and people satisfying to both the reader and the staff member.

It is yet too early to discuss adult education and its relation to libraries with any degree of finality. Only the test of use, following a period of experiment, can prove the success or failure of the efforts being made to aid in self-education through library guidance.

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#### THOUGHT QUESTIONS

1. Write a newspaper article of not more than 200 words announcing the establishment of a readers' adviser's desk in the local public library.
2. With what department in a medium-sized library would you connect a readers' adviser? Give reasons.
3. In the public library you know best, is the information desk a part of the Circulation or Reference department? Why is it located where it is?
4. List in order the points you would use in talking to a reading club at the Y. W. C. A. The general topic is to be: What the library can offer to guide the reading of the girl at work.
5. If you were an assistant appointed as readers' adviser, what would you do to prepare yourself for this work?
6. Contrast the first interview: (a) of a general reader wishing to find his way about the library; (b) of a borrower wishing to pursue a course in self-education.
7. What are some of the pitfalls attaching to the position of readers' adviser?
8. Enumerate several essential records peculiar to the work of the readers' adviser. What are the reasons for the variations from regular circulation records?
9. How can the service of a readers' adviser be approximated in a small library which can not give the full time of one person to this work?

10. After examining the report of the Commission on the Library and Adult Education referred to in the text, compare the methods of two different libraries in their adult education work.
11. Give five reasons showing why the public library is better fitted than any other agency as a center of the adult education activities in a community.
12. List three methods the small public library may use in furthering the work of adult education in the community.
13. Does the information desk seem to you to offer interesting and important opportunities for library service? Give reasons for your answer.
14. Make a brief of the genuinely cultural agencies in the community with which you are familiar. What part do books play in their activities?

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## CHAPTER 9

# Library Aids and Publicity

### I. USE OF TOOLS

### II. PROFESSIONAL PUBLICITY: OBJECTIVES AND METHODS

1. Lists and bulletins
  2. Bulletin boards, posters, and signs
  3. Book exhibits
- 

The place of the book in the life of the individual is a matter of constant speculation to the librarian awake to human reactions. Every effort exerted to bring the right book to each reader through a comprehensive and adequate service may take into consideration the *chance suggestion* that results, for instance, from the display of books and the *studied appeal* which can be based on analyses of community and group interests.

Almost every activity, every satisfactory service rendered, every successful contact made within its walls or in connection with civic movements results in publicity for the library. Good service or bad service may be equally far-reaching in creating the library's reputation and making its place in the community. The part that the circulation department and each assistant meeting the public play in building this impression has been stressed from many different angles. None of these is more important than the proper interpretation of the publicity value of service and of those aids which lead to wider usefulness.

Aids, whether books, files, lists, posters, or bulletins, are devised and exhibits are arranged in every library. A double function attaches to the use of these aids whatever their form may be, viz., (1) as tools, by the staff to help the reader, and by the reader to help himself, and (2) as mediums of publicity.

## I. USE OF TOOLS

The librarian in the circulation department, appreciating the mass of detail to be mastered and the wide acquaintance with books to be cultivated, finds need for all sorts of aids and tools. An appearance, if not the feeling, of real assurance may be acquired if close at hand are lists and books to supplement personal information. The limitations of the individual, in relation to the mass of information stored on library shelves, imply the need of any device which can make common property of the results of any search for information that is likely to be of future use. Not only must findings be set down but regular forms for such records and an adequate system of filing must be provided. Files of this sort as well as the ready reference books used as tools, and the lists kept at any circulation desk, are there primarily to help the assistant in his service to the borrower. However, guided by these same lists, readers soon learn to make an independent search of the shelves which might not otherwise be possible. When lists are attractively displayed or circularized, a particularly effective type of publicity is achieved, the effect of which may be far-reaching. The preparation of such lists may be a cooperative activity between reference and circulation departments.

For the purposes of this chapter, the tools referred to will be those books of ready reference, and other tools such as lists of books in many forms and the special card files, for example, an index to fiction by subject, or card indexes to useful sets of books. The choice of these tools may be largely governed by the location of the circulation desk in relation to the catalog, the information desk, the reference department and other rooms or special collections where such aids may be kept with equal fitness. If the library is a small, compact one, duplication of tools may not be necessary. But in most libraries it is impractical for the circulation assistant to use material scattered about the building. Therefore, books, files and lists which are suggestive and worth while are duplicated and kept on shelves convenient for consultation. Such

material must be planned to suit local demands and conditions, and its growth should be gradual. In most libraries it would include general standard printed catalogs as well as special printed catalogs adapted to the local collections. Special indexes of poetry, drama, or the short story will answer countless questions. Manuals, with suggestive annotations, lists of books arranged by form or by subject, various lists of "best books" selected by well-known people of unquestioned taste add many resources to those of the assistant. In any library a copy of the schedule of classification should be at the desk. In libraries classified by the Dewey decimal classification system, a copy of the relative index to the classification is an indispensable tool. It will send the assistant directly to the shelves without reference to a catalog. Readers as well find this guide enlightening because of its clear statement of the arrangement of books by subject matter, which they must understand in order to use the library intelligently. Other works of ready reference and lists which occur to members of the circulation staff from time to time should be added after an investigation of the books and the demands suggesting their acquisition.

Each assistant in the circulation department should know the scope of these tools and understand the questions which they can answer. As the collection grows, some system should enable all the staff to become familiar with the new titles. All should unite in keeping these books in order so that no time need be wasted in search. The usefulness of each volume should be carefully weighed at short intervals and books removed when no longer needed. Seasonal demands, such as occur at Christmas, Thanksgiving, or Memorial Day, may require that special indexes or lists of material in the library be brought in advance to these shelves. Many intelligent borrowers, knowing of the existence of these aids, develop skill in using them and enjoy the ability to meet their own needs independently.

If a fine spirit of cooperation exists, there is almost no limit to the opportunities offered for pooling information, saving indi-

vidual effort, and giving the reader the cumulated results of an attack of problems made by a united staff. Such cooperation unquestionably provides better service than can be supplied by the assistant working alone.

*Indexing* may profitably employ assistants on duty at desks where work fluctuates. These indexes may be roughly made on cards and filed in ways best suited to meet the demands of readers. Sets, compilations or any volumes containing important information likely to be forgotten or lost, furnish proper material for this work.

In many libraries, printed catalogs, lists and indexes are checked with the catalog or shelf-list and annotated to indicate the location of books or editions which the library possesses. Much time may be saved if a short story index, for example, shows at a glance that certain books containing the story sought are in the library, or may be borrowed from a branch. The checking of these catalogs, indexes and lists requires skill, care and time, but the results have proved that such time is well spent.

## II. PROFESSIONAL PUBLICITY: OBJECTIVES AND METHODS

Direct and indirect publicity is used by all libraries. Printed publicity, implying by reason of its permanency a careful thought for the form and content, and a regard for the responsibility attaching to it, is usually directed by the administration of the library, or one to whom this responsibility is definitely delegated. In most systems, no official contact with newspaper reporters, free lance writers, or others looking for human interest copy is allowed the general assistant. His part is to direct such requests to the staff member in charge of publicity work, or, under instruction, to accumulate material which can be incorporated in library publicity, but an understanding of the library policy that no unauthorized statement must be allowed in print is a first requisite as a means of protection for both library and staff interests.



General library publicity has been covered adequately and fully in two books which every assistant should know and use:

WARD, G. O. *Publicity for public libraries*. Wilson, 1924.

WHEELER, J. L. *The library and the community*. A. L. A., 1924.

For the purposes of this book, publicity will be treated from the angle of the circulation department with only such consideration of the general problem as is necessary for background.

The preparation of library book lists, posters, book exhibits, and displays is never-ending, and their variety is as limitless as the purposes for which they are made, and the manifold uses to which they are put. They may call the attention of the borrower to books which the library wishes to "push" for his advantage. Or, they may first be considered as a means of offsetting the personal limitations of the assistant with focused information, assembled as a result of cooperative effort, thus broadening the range of public service. Whatever the reason behind the use of printed or multi-graphed book lists, or other devices designed to attract public attention to books and their contents, invaluable help accrues to the assistant and to the borrower, both directly and indirectly. Furthermore, a fine dignified type of professional publicity can result from the use and distribution of book lists, particularly those with careful annotations. The library's desire and ability to prepare lists on any subject of public interest may be thus clearly demonstrated. The publicity derived from the intelligent use of the various methods and devices described in this chapter will not be cited in connection with each that is described, though these results must never be overlooked and the thought of the threefold use of library aids set down at the beginning of the chapter must be uppermost in the student's mind.

## 1. Lists and bulletins

Book lists are prepared by every library to meet local conditions, to encourage the use of local collections, or to meet or create special

demands. They are also often made with a view to satisfying some need felt by libraries generally and are supplied or sold in quantity to such libraries. Most libraries have many lists of both sorts for free distribution to the public, and display them attractively in specially designed racks. When lists must be sold because of the expense of publication or purchase, this duty is as frequently assigned to the information or other special desks as to the circulation desk.

The whole staff should be interested in suggesting topics and titles for book lists, though a word of caution may be said on this point. The reader's wants should be kept in mind, even at the sacrifice of bibliographic form. *Lists should be made for the satisfaction of the consumer rather than the compiler.* Book advertisements in magazines, publishers' lists and circulars, commercial lists from booksellers, as well as the demands of borrowers, all suggest titles and subjects which the library can treat in its own way and for its own purposes. A list may anticipate a request for special material as, for example, the annual prize contests in schools, concerned, year after year, with different aspects of the same subject. Records of any material thus used may be preserved and articles may be included which have been discovered by more thorough search than each call alone would justify. Lists can also be distributed, posted or published in an effort to create a demand for books to which the library wishes to call readers' attention.

The selection of books for lists involves many questions and presupposes, preferably, a first-hand knowledge of the contents of each volume. The book list compiled for general use differs essentially from the more formal reading list and courses prepared by a readers' adviser. A general list may be arranged alphabetically by author or by title, though readers usually prefer an arrangement by title. Or, a group of books descriptive of several aspects of a general subject may be divided under sub-heads. Experiment with the form of lists is both interesting and profitable.

It is a good policy to avoid the list of new and popular books which readers discover without introduction and demand without encouragement. A list is more satisfactory both to the library and to the reader if it calls attention to good books which the reader has a fair chance of finding on the shelves and for which he might not otherwise ask. Books included in certain types of lists should meet definite literary and artistic standards. Naturally these standards will be relative; the requirements for a list of detective stories will differ from those for a list of biographies. But the mere fact that a library lists a title implies a recommendation of that book to the reader, and suggests that it has been found to possess attributes worthy of his notice.

Before going further into the different types of book lists, their compilation, their forms and their uses, the question of *annotations* may well be considered. It is generally conceded that a short list of titles with a well-turned, attractive annotation for each book is more useful than a longer array, offering no clue as to the contents of each volume or the point of view of its author. The writing of annotations requires skill and understanding, and the ability to do it is developed only after much practice. These notes may be merely descriptive, or they may incorporate carefully balanced critical estimates, if the compiler is qualified to offer a responsible original opinion, or to present the criticisms of others. The question as to whether or not the book note should be critical is often determined by the subject of the list, the reason for preparing it, and the ability of the assistant doing the work. If it is critical, personal prejudices must be carefully avoided and a fair statement made. The annotator who can, in a few words, arouse the justifiable interest of the reader, has a special gift worthy of encouragement. An annotation must be clear and definite since it cannot take for granted that the reader knows anything about the author, the book, or even the subject. Publishers' announcements and the thumb-nail summing up of books found in many reviews supply facts and suggestions for those who write annotations. In many libraries the assistant learns to use the *Booklist* and other

periodicals issuing short descriptive notes on new books, which are often filed for ready reference. Duplicate copies may also be clipped and the note pasted in the front of the volume to which it applies, for the benefit of borrowers. A real advantage comes from having annotations written by assistants who receive frequent calls suggesting need of the lists. From their experience with books and people a special ability develops to estimate in advance the use that may be made of books as well as lists.

*Types of lists*, their form and content are suggested by the varying angles of interest presented by the readers whose needs they are designed to meet. The call may come for selected lists on almost any subject, or for a selection of books similar in literary form, as biographies, plays, essays, etc. In addition to a subject arrangement they may also be grouped according to literary merit, as for example, "Novels of distinction." Lists may be short and annotated, or longer, including a variety of topics having no particular arrangement or relation. They may be compiled to meet seasonal demands. Attractive headings may tempt the public to read during vacations. Such lists are often widely distributed, and should contain titles of books which, having passed their first popularity, tend to accumulate on the shelves. The inclusion of these books in lists may revive a desire to read them and prolong the useful life of books whose worth justifies this course. For example, on busy days when copies of the perennially popular western stories by the better-known writers of the moment are not to be found, a list containing favorites of former years may recall books momentarily forgotten but perfectly satisfactory to the borrower. Christmas lists are popular long in advance, and Hallowe'en suggests ghost stories in October. Just as these widely observed holidays and occasions offer opportunities for special lists, so local happenings enable the library to use this type of publicity and to participate in public affairs. Any state or county conference is worthy of notice, and the library's participation with lists for distribution is highly important. These may well be supplemented by displays of related books.

Another interesting type of community cooperation can be achieved when the library is informed in advance of the plays that are to be produced at moving picture theatres. The call for books reproduced in films usually begins with the announcement of the pictures. Short lists of books similar in character or having some relation to the book reproduced may be compiled on receipt of the advance warning. Managers of theatres will often bear the expense of printing lists which may be in the form of book marks, bearing the library imprint as well as a carefully worded announcement of the forthcoming production. Valuable propaganda may result from this cooperation between libraries and managers through insistence on the good quality of the films advertised and a reasonable book connection. Before creating such a demand, the library will wisely survey its book stock and perhaps add duplicate copies to avoid advertising books which cannot be supplied.

*Lists of new books* added to the library are issued regularly and are of varied use. Interested borrowers often have these mimeographed, multigraphed, or printed lists mailed to them. Newspapers in many communities print them regularly, often as an insert on a page of book reviews. A bulletin of additions issued periodically, often monthly, is published by many libraries, as well as state library extension agencies. These annotated lists of accessions frequently contain also supplementary lists on topics of timely local interest, or lists designed to create interest in various divisions of the library. Bulletins issued by state library extension agencies are planned to be of general professional interest to the libraries throughout the state, and frequently include both lists of new books, signed articles, editorials, and other professional news.

The *form of a list* and its general make-up have much to do with its popularity and usefulness. The book mark or the small folder of envelope size is well adapted to lists, but a list may be of any shape, or color, preferably not too large, and should be set up with clear, legible type.

The use of lists as an aid in book distribution offers an interesting opportunity for observation to the librarian who chooses to experiment with this type of publicity. The circulation of a particular class of books, or a small collection, before and after the issuing of a list may show not only tangible results, but may suggest numerous ways in which to help the public to a wider use of library resources.

The circulation assistant interested in the relation between the use of lists and use of books often has a definite idea as to the number that should be printed or multigraphed; and which should be reissued or revised and when this should be done. Certain perennially popular topics are invariably revised and reissued before the stock is exhausted.

## **2. Bulletin boards, posters, and signs**

The distribution of bulletin boards, posters and signs in a public library calls for a certain restraint, an eye for fitness and appropriateness, a sense of proportion, and a realization of the fact that an indiscriminate array of this material may easily create a wrong impression. In many large and stately library buildings bulletin boards are out of harmony with the architectural plan and are not used. Buildings designed to create a different impression may be directed by a different policy. In other words, whether a library is small or large, the use of public bulletin boards, signs and posters should be governed by the architecture, the location of the library or branch in the community, the type of readers served, and the relation and understanding between the readers and the staff.

Bulletin board announcements often call attention to community activities of a more or less cultural nature which the library chooses to encourage. The assistant will find comfort and protection in a declared policy which requires him to refer borrowers offering notices for display to someone in authority. In larger libraries, bulletin boards of various forms are required

as directories to the building. All libraries use general bulletin boards to call attention to particular books or groups of books. To spur the continued interest of the readers who come and go, the material on these boards must be frequently changed. Many queries are suggested to the borrower by such displays from which unsuspected hints for a wider range of use are conveyed to the staff.

Attractive *book jackets* offer good material for bulletin board displays. These must be carefully selected to include covers for only those books which the library feels should be generally advertised. It is often wise to refrain from posting the covers of the very popular books, particularly fiction, since this may create a demand impossible to satisfy. Jackets may be grouped by subject matter of books, or arranged in any attractive way to please the eye and arrest the attention of the passer-by. A helpful and time-saving device is introduced if the call number of each book is plainly written on the cover, thus sparing the reader and the assistant the necessity of searching for the books in the catalog. Space on bulletin boards can be saved by cutting from the cover quotations from excessively favorable reviews and advertising matter for other books by the same author which the library may not have. The note or "publisher's blurb" is sometimes allowed to remain, depending on its quality and the type of book it advertises. Announcements or lists of books which the library wishes the public to notice may often be introduced into the midst of a group of such covers, and will be more generally read than if displayed elsewhere.

The winged bulletin board, having two or more frames each with display space on two sides, occupies little floor space compared to its display area and may be made very attractive to the public. Responsibility for definite bulletin boards may be distributed among the circulation assistants, or, in smaller libraries, each department may be assigned space for the display of its own activities.

In addition to these public bulletin boards, staff or departmental bulletin boards are useful and should be placed where assistants cannot avoid seeing them. The staff should cultivate a habit of inspecting these boards regularly. Here should be posted work schedules, new rules and policies, and other departmental or staff notices of general interest and notices of activities inside and outside the library.

*Posters* present almost the same problems as bulletin boards and call for the closest supervision. Too many posters may easily mar the appearance of a library and destroy the sense of quiet unity which the borrower should feel as he enters. The use of posters, their preparation, the selection of captions, the titles of books to be listed, and pictures to be incorporated, the relation of color to the color scheme of the library, and similar problems all call for careful planning, usually in consultation with the head of department or other person in authority. In some systems posters for all departments are made by capable staff members who are responsible for all the work involved. But in many libraries those for the circulation department are done by circulation assistants as pick-up work, frequently during summer months. Assistants with no particular ability for painting or drawing can often trace lettering for headings, mount pictures clipped from magazine covers or advertisements, and by skilful color combinations make posters, which are original and artistic and can be used over and over again. The staff member who discovers an unsuspected facility in this type of work may develop a latent interest in artistic composition, and an ingenuity in securing results whereby the library is directly benefited.

In addition to the posters made locally, much use is made of the artistic printed posters supplied by agencies with which the library desires to cooperate. These posters may call attention not only to matters of library interest, as do those supplied by the American Library Association and the American Booksellers' Association, but also to other welfare and cultural activities. Foreign travel posters have recently been increasingly available;



some collections of these posters are distributed to libraries free of cost and others are lent.

*Signs* to direct the borrower should be as few as possible, but where essential should be clearly stated, legibly and attractively printed or lettered in permanent form, and prominently placed.

### 3. Book exhibits

The increased use of individual books or small groups of titles that may be stimulated by separating them from the mass and displaying them prominently, offers never-ending opportunities for experiment and observation. An interesting comparison may be made in any library between the reactions of readers to the display of books themselves and to book lists. The same books may at one time be displayed, and at another may be included in a well-printed list. The effectiveness of these two definite types of library publicity may prove suggestive of future methods to be employed in the circulation department. Such experiments and observations should be quietly made, for readers do not enjoy a searching scrutiny of their habits and reactions. The assistant will soon learn that aid in book selection need not necessarily be the result of personal contact. More telling results can often be secured by suggestion, by placing small, carefully chosen groups of attractive books where they can be seen, examined and weighed by the reader who prefers to make his own selection. The placing of display racks and book exhibits has much to do with their usefulness. The same types of books, picked with equal care but differently placed and arranged in the same room, may make a very different appeal, and be subjected to very different use. It is often worth while to place exhibits or displays so that an interested borrower may draw up a chair to examine them, or carry a few volumes to a nearby table for investigation.

After the position of the display has been selected and its general character determined, the books to be put on display shelves should be carefully culled. Readers soon learn whether displays are built from book covers or from content. As the reader de-

velops confidence in the judgment and taste of the staff, the usefulness of book exhibits increases to an astonishing degree. Exhibit shelves must be replenished as they are depleted during the day. The whole staff, endeavoring more or less consciously to keep these racks attractively filled, often finds it easy to pick up volumes which catch the eye and to place them in the way of readers. If an assistant is skeptical as to the use made of such displays, let him consciously leave an attractive title in its place on the shelves and see whether it stays there longer than it would on the display rack. Books which are not taken by the public from displays within a reasonable time should be removed. The borrower returning after an interval should not see the same titles found there days before. The fact that the books are constantly shifting to make room for new volumes leads the reader to expect fresh suggestions each time he comes. An assistant coming on duty may profitably spend a few minutes walking among the open shelves to see what is in, to estimate the reserve force, so to speak, and to know where to find volumes with which to replenish the exhibit shelves when the rush of work comes.

Perhaps in planning book exhibits a shelf will be assigned to biography, for example. Much may depend on the general attractiveness of the sign calling the reader's attention to this display. A short, telling quotation, or a descriptive phrase is often effective. The books chosen may be a collection of lives of "Women of achievement," or a group representative of a certain period, e. g., "Men of the French Revolution," "Leaders of the American Civil War." When diaries are attracting attention, the first volumes of a number of famous diarists' voluminous records may lead readers farther than they might otherwise go. During a period of strikes and economic distress, the biography shelf may contain a group of books about labor leaders of all nationalities. All the activities of men may be found reflected in books that have been written about their lives, and in these books lies much of the knowledge and inspiration which the library wishes to make easily available.

Displays of a more miscellaneous character call for labels likely to suggest a broader selection to the borrower. "New books" suggests a perennial, attractive display. Many libraries regularly display, for three or four days each week, new non-fiction. Thus readers have an opportunity to examine books instead of depending upon weekly lists of additions, and to leave reserves for them. It is essential that the circulation assistant look over these books during the period that they are held. A clearly lettered sign usually calls attention to the fact that they are being held until a definite day. Though an individual may occasionally object to the ruling which forbids him to take a book when it is at hand, a statement of the broader purpose of the display will usually pacify him. Some symbol or device is necessary to insure the return of books to the exhibit rack rather than to their place on the shelves and to prevent their being taken out too soon by borrowers. This may be accomplished by removing book cards before the books are placed on display and writing the date of release in ink at the top of the date slip. The book cards may be held at the desk in the interval before the books are circulated. If reserves are left for these titles, it is a simple matter to attach a symbol to the book card and thus save later search. When these books are ready for circulation it is only fair that a reader who has come specially for one and is waiting, be permitted to take his book regardless of reserves. Otherwise he may justifiably be annoyed to have it drawn out almost from under his hand for another reader who has left a reserve. The volume, when returned, is automatically held for those who have left reserves.

The unlimited range and variety of publicity and service supplied by book exhibits can only be suggested. An exhibit, like a list, can meet an obvious need or create a broader interest. Community activities of all types may serve as the inspiration for book displays in the library. For example, collections of local histories or books of timely local association may reflect occasional happenings or celebrations. Notice can thus be taken of literary

anniversaries, or the death of a well-known author may suggest a collection and display of his works. Beautiful editions and rare books of historic interest never fail to make an appeal. An exhibit of etchings may be the occasion of a display of related books. "Better Homes Week" stimulates interest in books on interior decoration and house plans. "Children's Book Week" has come to mean a broad and general community observance which should certainly center in a book exhibit at the library and schools. Local book dealers and librarians may be closely drawn into a combination through which the library ideals for children's reading may be given a widespread publicity and interpretation in other special book displays.

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### THOUGHT QUESTIONS

1. Make a short, annotated list that might be used as a book mark for distribution by a moving picture theatre at which a film dramatization of *When knighthood was in flower* is to be presented. In doing this, consider the audience to whom appeal is to be made.
2. Suggest some community activities in which the library may take an active part by making lists and displays of books.
3. Plan and block in, in miniature, a poster calling attention to books listed and displayed in connection with some community activity in which you are interested.
4. Discuss the relative merits and usefulness of each of the following:
  - (a) Short annotated book lists and longer lists without notes.
  - (b) Lists on individual subjects and general lists of unrelated books.
  - (c) Typed lists and printed lists.

5. Examine and list the collection of ready reference tools at the circulation desk in a public library. Give the reasons for the inclusion of each tool. How does the size and arrangement of the library building affect the content of this collection?
6. With this list as a basis, tell what should be done annually to keep it alive.
7. What would you say to the friendly library user who happens to be a newspaper reporter and wants to talk to you about the incidents of the day's work? In general, how would you explain to a new desk assistant his relation to the publicity problem?
8. Make a list of six titles of short stories or essays, to be used at Christmas time for adults. Suggest an attractive title and the best arrangement possible. Make annotations short and crisp, yet descriptive.
9. Assume a collection of new books (non-fiction) to be on display in a particular circulation department. Mention circumstances under which this display might be used, (a) by a borrower, and (b) by an assistant. Tell how it might be used in each circumstance.
10. Select a list of five good books (not necessarily the best) on topics of your own choice and prepare brief annotations for each, not more than three sentences in length.
11. For purposes of experiment, try out three methods of publicity. Make a list of twelve books on a selected topic.
  - (a) Make a poster advertising these books and watch their use for a definite period.
  - (b) Make a list, with or without annotations, using the same title and the same books. Distribute these lists in the usual way. For a similar period watch the use of these books.
  - (c) Display the books themselves, with a sign or bulletin, merely calling attention to the subject, and watch their use for a similar period.Draw your own deductions as to the publicity value of this poster, list, and book display.
12. Plan a "ladder list" for the reader who likes *Tarzan of the Apes*.

13. Suggest methods which a circulation department may employ to distribute lists.
14. Take charge of the library school bulletin board for one week, posting material which might appeal to readers who present themselves at a circulation desk. Invite criticism from members of the class.
15. Visit a public library and determine the purposes for which it uses bulletin boards in the circulation department. Do you like the displays? Why?
16. Does the circulation department in the same library maintain special indexes for the use of circulation assistants? If so, describe them.
17. Describe the book exhibits and their arrangement in the same library. What specific suggestions can you make for more effective and useful exhibits?

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## CHAPTER 10

### Desk Routine

#### I. ORGANIZATION

1. Division of work
2. Assigning work to staff
  - (a) *Desk duties*
  - (b) *Clerical duties*
  - (c) *Telephones*
  - (d) *Pick-up work*
  - (e) *Rotation of duties*
3. Heat, light and ventilation

#### II. SCHEDULES

1. Purpose
2. Distribution of hours and work
3. Forms of schedules
4. Change of schedule
5. Sunday and holiday schedules

#### III. SHELF WORK

1. Organization
  2. Shelving books
  3. Labeling shelves
  4. Shifting books
  5. Reading shelves
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### I. ORGANIZATION

The early chapters of this book have set down the details of procedure for the circulation of books. In order to vitalize these processes and to put into operation any system planned, a desk routine must be devised for the circulation department. This is largely an administrative function yet the assistant must see each problem arising in the distribution of routine duties in its relation to the library and to the individuals composing the department staff. This double responsibility involves the library's obligation for service and all that this implies. It also includes a plan for the distribution of duties arranged with a regard for the possible growth and development of each assistant in the work assigned. The relation of the staff member to the general administrative problem, and the importance of his position as a responsible unit in a system should be quickly perceived and appreciated by the student.



In the organization of the desk routine the head of any circulation department will survey the field of activities, and outline fully and logically those duties which must be regularly performed day by day. The distribution of these duties must be so planned that regardless of casualties among the staff the work of the department may proceed without interruption. This calls for a flexible organization, simple yet capable of expansion, based on broad ideals of service. Such a unity can be achieved only through the cooperation of assistants whose attitude toward the public shows easy familiarity with the routine of procedure and a mind free for attention to the borrower.

### 1. Division of work

In making the necessary division of various duties, the administrator must consider the qualifications of each individual member of the staff in relation to the work to be done. Personal endowments and preferences of the assistants may be profitably regarded within reason, and duties may be so arranged that each staff member has the opportunity to follow and develop his natural bent. It seems fair as well as wise to give to each assistant the responsibility for a certain definite duty. As nearly as possible this will be his own work, and by interest and ingenuity he may be able to improve the procedure and perhaps enlarge the scope of his usefulness. Since clerical and other definite routine duties vary in importance and the degree of responsibility, they may be graded so that the assistant progressing from simple duties to those of greater difficulty may have the encouragement of advancement. In addition, a developing sense of responsibility may be cultivated, especially if the assistant is held accountable for mistakes. If, furthermore, the idea is inculcated that the cumulative success of the whole department depends on the proper performance of each duty, a fine stimulus may be projected into all routine work.

The size of the library and the physical arrangement of quar-

ters and equipment control largely the division of work. In small libraries the staff interchangeably will handle various routine duties as they present themselves. As libraries increase in size, separation into departments becomes necessary and desks for various divisions of the work multiply, thereby complicating the distribution of the staff.

## 2. Assigning work to staff

(a) *Desk duties.* The first and most important problem in assigning work to the staff is that of manning the desks. Enough people must be assigned to each public desk to handle the heaviest call expected there, unless it is possible to summon extra help as it is needed. In small or medium-sized libraries, all desk assistants do general work, which includes charging, discharging, and slipping books, registering borrowers, renting books, and possibly supplying information and the service of a reader's adviser as well. In larger libraries these duties are separated and handled by different staff members to whom they are definitely allotted.

Work at a busy circulation desk, where assistants are assigned to stay at a post until relieved, may sound monotonous, but there need be no monotony. The public presents a constantly shifting and endless chain of problems and the assistant who is quick to detect what is behind the request seldom finds two alike. For this reason it is not possible to draw a typical outline of all duties performed at any circulation desk. The first daily duty usually consists in seeing that stamps, calendars, fine computers and other mechanical aids are in order. This will probably be the responsibility of one assistant. Other assistants will meet the public, increasing in number as the demand for service increases during the day. Additional assistants will be available for service to the public though not expected to remain stationed at desks. In dull hours all desk assistants may help with the clerical work, or they may have at hand pick-up work, which will shortly be described. The first responsibility, however, is always to the public, and at

circulation desks no work should be done of a character so engrossing that the borrower feels he is interrupting the assistant to make his request, or that the assistant feels it cannot be dropped to serve the reader. Each assistant should cultivate quickly the ability to be busy at a desk and yet to know all that is going on about him.

(b) *Clerical duties.* Definite clerical duties in public libraries deal with: (1) registration; (2) arranging and filing book cards; (3) overdue notices and messengers; (4) reserves; (5) statistics. These major clerical duties are often divided among several assistants, in order to handle promptly the detail connected with them. When the volume of work requires several people for this routine, one assistant is frequently put in charge of a division of this work and assigned such help as is available. The registration of borrowers involves such careful detail that in some large systems it is handled by a separate department. The steps involved in sending overdues or reserves lend themselves to division among several assistants. Different assistants may also be responsible for the daily count of adult and juvenile books and for the monthly statistical reports based upon these daily records.<sup>1</sup>

The following additional duties are to be performed: (1) borrowers' addresses must be changed in the registration records; (2) borrowers' cards left at the library must be filed; (3) records for expired borrowers' cards must be withdrawn; (4) books for the blind requested by mail or telephone must be charged and mailed, and many other similar duties must be kept up-to-date during the duller hours when the assistant can be spared from the public desks.

Since libraries are usually less busy before noon, fewer people can handle the circulation desks during that time, leaving more free to perform the clerical duties which are often disposed of during the morning. Enough assistants are often assigned to finish the various daily duties as early in the day as possible. Work of this character can be more accurately and rapidly performed

<sup>1</sup>See Chapter 11.

if desks can be provided out of sight of the public, preferably in a departmental work room. If more assistants are visible at a circulation desk than are needed to meet the public, a false impression of extravagance and mismanagement may be created. Any assistant on duty is always subject to call for help in some unexpected rush of work, to relieve a desk assistant, or to furnish advice on a subject in which he may be considered expert. Frequently clerical duties are given to assistants who have no desk duties or other contacts with the public.

(c) *Telephones.* The use of the telephone presents a real problem in the library, though it should be recognized as offering great possibilities for public service. The number of calls increases constantly where the community is encouraged to use this means of securing information. In many systems all incoming telephone calls are received and distributed by the circulation department. One assistant may, therefore, be assigned to attend to this work. In the intervals, free time may be filled with such occupation as can be readily interrupted. Numerous renewals may be taken over the telephone and thus create a volume of work for which the schedule must provide. In addition to caring for general inquiries and explanations, the circulation department may use the telephone with excellent results, to save personal interviews and letters; to notify readers of urgently needed reserves; for follow-up work on overdue books; and for all kinds of aid to branch libraries.

Use of the telephone for brief business and emergency calls is commonly permitted the staff and sometimes allowed the public, though this is generally discouraged. Social calls are universally discouraged. Telephone procedure in the small library may be more liberal, though the telephone is often in the office of the librarian, who may distribute the calls.

(d) *Pick-up work.* The assignment of duties to a circulation staff must be based on the usual amount of work done at various desks at different hours of the day. As a result, in days when the

weather is very bad or unseasonably good, or when some community activity attracts the public more irresistibly than the library, more assistants may be on duty than are actually needed. Therefore, work not requiring immediate completion must be provided which may profitably be performed by the circulation assistant at such times. This may be any library work which can easily be picked up and put aside by an assistant held at a definite desk or released from a customary post because of unusual conditions. Generally descriptive terms applied to this work in libraries are pick-up work and busy work. Much may be accomplished if the staff is inclined to cooperate. If work for other departments of the library is distributed, a sense of the unity of the whole system may be fostered in the mind of the assistant, who is likely to know less than he might of the varied activities of the library.

As pick-up work, full book cards may be copied or minor repairs may be made on books. The assistant also may read shelves, that is, check the books on a shelf for correct arrangement. It may be necessary to do this within reach of the desk where he has been assigned. Good pick-up work is provided if the department maintains special files of material for staff use, such as lists of the contents of sets of books not adequately indexed, or subject cards for fiction. In many libraries the writing of order cards from checked reviews and publications is done largely by assistants at the circulation desks. Order cards may also be compared with the public catalogs to avoid duplication in the purchase of books. These particular duties are merely suggestive.

(e) *Rotation of duties.* Each member of the staff must have an understudy capable of carrying on the work in case of absence, vacations, or changes in schedules. The assistants on duty at any time must be capable of doing the necessary work of the department. Aside from definite assignments, some library administrators hold the opinion that rotation in the routine duties of the department shows excellent results. Frequent exchanges of work bring out new ideas and new points of view. The individual varies activities by moving from post to post in the department, or from

clerical duty to an assignment outside the desk which carries with it the obligation to go from borrower to borrower, giving assistance and guidance. This latter type of service is often referred to as floor work. The activities may be equally strenuous at both places, but the change enlivens the day's work and makes it easier. By moving from post to post in the department, speed and accuracy in all the routine processes can be cultivated concurrently. Although the advantages of this exchange or rotation in clerical or routine duties are evident, the shifting of assistants in larger libraries may entail difficulties arising from the inequalities in a large staff. However, if the circulation assistant is to acquire an ability to survey the field of work and to regard it critically with a view to improvement, the opportunity must be provided to approach the work from all angles.

### **3. Heat, light and ventilation**

The regulation of working conditions not only has much to do with the health and general well-being of the staff, but the public also is inevitably influenced in its attitude toward the library by the temperature, light and ventilation of the rooms. Since personal vagaries and preferences of the staff as well as of the public may cause much discomfort to many people, all regulations usually originate with the head of the department. A general rule requires that readers wishing changes in heat, light, or ventilation should refer these matters to the staff. A willingness to meet the readers' requests must be coupled with a firm policy if a clash is to be avoided between individual likes and dislikes.

It will probably be necessary to determine a stated temperature for rooms in winter and to regulate the heat accordingly. Also a definite plan for ventilation may be arranged if a system has not been constructed in the building. In most libraries the use of lights must be regulated, first as a matter of comfort for the staff and the public, and next as an important economy measure, especially in stacks which are not in constant use. Window shades

may make a room bright and sunny, in winter or cool and inviting in summer.

## II. SCHEDULES

### 1. Purpose

The number of working hours for the staff and the hours of opening and closing for the library system will be settled by the administrators in the organization of the library. Since many libraries are open from twelve to thirteen hours a day and most staff members work from thirty-eight to forty-two hours a week, a regular schedule must distribute the hours of service for each member of the staff so that the whole period of opening is adequately covered. Schedules are usually made by the head of the circulation department, a senior assistant, or some member of the general staff peculiarly fitted for this work. In smaller libraries a general schedule for the entire staff rather than for departments is made by or in conjunction with the librarian. If the best results are to be achieved for all concerned, the work will be allotted fairly to the assistants available, taking into account the personal traits, experience, training and interests, and wherever possible, the convenience of each. When it does not sacrifice fairness, the assistant's preference for hours of work or of freedom will be considered. He may live near the library or far from it and may wish to spend free time in attending classes or courses. Whatever the reason, the librarian who makes it possible for the assistant to keep in touch with outside interests will receive a loyal and enthusiastic cooperation which more than compensates for the effort involved in arranging the schedule. Furthermore, the profit which the library gains from the regular connection of staff members with local activities is worthy of consideration. In communities where colleges and universities offer opportunities for study, libraries sometimes grant a certain number of hours of library time each week to individuals who wish to carry courses of study. This necessitates a large staff, a specially

planned schedule, a willingness on the part of all assistants to cooperate and an equal distribution of such opportunities.

In making schedules, a circulation staff will need to be considered as a whole, and divided so that the personnel on duty in the department at any time of day or night shall be balanced fairly in its equipment for service and in its ability to meet emergencies. This balance must apply to experience and responsibility on the part of the staff as well as to number. Some libraries require that the head of department or a senior assistant be always on duty. Such an arrangement is not easy to accomplish because of other demands of equal importance on the head of department and senior assistants. Hence schedules must fit local situations and may, with justice and fairness, incorporate traditional or personal adjustments which prove satisfactory to the staff.

## **2. Distribution of hours and work**

The schedule will assign to the morning hours a staff sufficiently large to carry the work with the public and to complete the routine clerical duties. Lunch and supper hours must be so assigned that no desk is ever short of assistants.

In every community local conditions and the location of the library determine the rush hours. The library may be in a business district where workers stop in during lunch hours or when work is over; or a school may be close by from which the pupils come in crowds on being dismissed; or the library may be near a transportation transfer point. The schedule must provide a full staff to meet expected demands for service and give each assistant a fair share of work at heavy hours during the day or evening.

Common practice suggests that a weekly half holiday may be granted each assistant. Half holidays are rarely assigned for Saturday or Monday since these days may require the entire staff for full time to carry the work of the department. When the library is open from nine A. M. to nine or ten P. M. staff members sufficient to cover the night schedule must be withdrawn from



service during some part of the day. This is usually arranged by scheduling all assistants for a certain regular number of hours of work each day. The assistant who works at night may be given an equal amount of free time in the morning or the afternoon. In large cities where great distances must be traveled, assistants on duty at night often prefer to be free in the morning and work through the afternoon and evening. There are also occasions when the staff desires, or the schedule requires, what is variously called a broken day, a swing day, or a split day, that is, the assistant works morning and night and is free in the afternoon. Duty for a certain number of nights each week may be assigned to every member of the staff or to volunteers. Night schedules usually assign only the number of assistants adequate to handle the work with the public. All possible routine desk work should be put aside until more people are on duty during the day and the work can be handled without interfering with service to the public.

The rotation of duties described earlier in this chapter can be practically introduced into the schedule and distributed through the staff.

### 3. Forms of schedules

Two definite types of schedules are required in most circulation departments, one based on staff and the other based on duties performed and both involving the hours of service. The first must link the assistant and the post of duty and the other must distribute hours and staff according to the duties. Schedules are usually made for at least a week.

A tabular form of schedule based on the first type may also combine certain features of the second type. The staff is listed alphabetically or by seniority at the left, and the hours or periods are listed across the top, one to a column. Check marks or symbols indicating the hours on duty, appear in the correct columns opposite the name of each staff member. By the further intro-

## CIRCULATION WORK

duction of symbols or by the use of colored inks, it becomes possible to show for each assistant the work as well as the desks or posts to which he is assigned at any hour of the day. Variations in hours of arrival or departure may easily be indicated.

		9-10	10-11	11-12	12-1	1-2	2-5	5-6	6-7	7-9
M	Adams	✓	✓	✓	✓				✓	✓
O	Brown					✓°	✓°	5 <sup>12</sup> ✓°	✓°	✓°
	Cox					✓°	✓°	5 <sup>12</sup> ✓°	✓°	✓°
N	Thayle	✓	✓	✓		✓	✓°	✓°		
	Hall +	✓	✓	✓	✓					
J	Jones	✓	✓	✓	✓				✓	✓
A	Morton	✓	✓	✓	✓		✓	✓		
	Taylor	✓	✓	✓		✓	✓	✓		
Y	Thomas	✓°	✓°	✓°	✓°				✓	✓
	Thompson	✓	✓	✓		✓	✓	✓		
	Warren	✓°	✓°	✓°	✓°					
	White	✓	✓	✓	✓		✓	✓		
T	Adams	✓°	✓°	✓°	✓°					
U	Brown	✓	✓	✓	✓				✓°	✓°
	Cox	✓°	✓°	✓°	✓°		✓°	✓°		
E	Thayle	✓	✓	✓		✓°	✓°	5 <sup>12</sup> ✓°		
S	Hall					✓	✓	✓	✓	✓°
J	Jones +	✓	✓	✓	✓					
	Morton	✓	✓	✓	✓				✓	✓
A	Taylor +	✓	✓	✓	✓					
	Thomas	✓°	✓°	✓°		✓°	✓°	✓°		
Y	Thompson	✓°	✓°	✓°						
	Warren					✓	✓	5 <sup>12</sup> ✓	✓	✓
	White	✓	✓	✓		✓	✓	✓		
W	Adams	✓	✓	✓		✓°	✓°	✓°		
	Brown	✓°	✓°	✓°	✓°					
E	Cox +	✓°	✓°	✓°	✓°					
J	Thayle	✓°	✓°	✓°		✓°	✓°	✓°		
N	Hall	✓	✓	✓		✓°	✓°	✓°		
	Jones	✓	✓	✓					✓°	✓°
E	Morton					✓°	✓°	5 <sup>12</sup> ✓°	✓°	✓°
S	Taylor					✓	✓	5 <sup>12</sup> ✓	✓	✓
J	Thomas	✓	✓	✓	✓				✓	✓
	Thompson	✓	✓	✓	✓				✓	✓
A	Warren	✓	✓	✓	✓		✓	✓		
Y	White	✓	✓	✓		✓	✓	✓		

SCHEDULE. Symbols are used as follows: ✓ = hours on duty; + = half holiday; ° = assignment to open shelf room. Additional symbols may be used to indicate other assignments, e. g., registration, overdue notices, etc.,

With this type of schedule it is possible to know the assignments for each member of the staff; it is equally possible to ascertain the assistants who will perform any duty at any hour, and when any individual will be at any given post in the department. Local situations will suggest necessary arrangements and individual ingenuity will contrive ways of meeting demands. The department schedule should be posted. In some libraries each assistant is given a copy of his personal schedule.

#### 4. Change of schedule

(a) *Departmental schedules.* Opinion differs widely as to the procedure in changing department schedules. In many libraries they continue in force until radical changes in the staff require a rearrangement of assignments, or until the actual working of the schedule has shown that it should be strengthened. If the schedule has been carefully balanced, and the convenience of the assistants considered, there seem to be many advantages in a more or less permanent schedule. The assistant knows long in advance his work hours and free hours, and can plan for outside activities with a sense of security not always feasible with weekly or monthly changes. The borrower who comes to the library at regular intervals is reasonably certain of finding the same assistant at the same desk again and again. The advantage to the assistant of this regularity is questioned by some libraries which week by week prepare new schedules or rearrange old ones, shifting the assistants according to a regular scheme. This is done on the grounds that it gives a fairer distribution of privileges and responsibilities. Where the number of hours of service is exactly alike for all and members of the staff are equally well equipped to meet any demand, a regular rotation may automatically distribute advantages and disadvantages equally. This can be managed only among members of a small staff or in larger libraries among assistants of the same grade or rank. The latter situation would be found only where members of the staff are classified according to their

training, ability and experience, and are assigned duties and responsibilities accordingly.

The schedule which carries through till the need of change manifests itself can be used only during that period of the year when the whole staff is regularly on duty. In the summer when the volume of work decreases and vacations and leaves of absence reduce the size of the staff, substitutes are often appointed and schedules must be arranged to cover the changes in personnel. If the time allotted for the vacation of each member of the staff is announced in advance, all necessary schedules may be made early in the season, otherwise they may be posted weekly.

(b) *Individual schedules.* A generously administered circulation department often permits assistants to make temporary changes or exchanges of time in order to allow participation in some activity worth the effort of readjustment. Rearrangement or exchange will need to be considered carefully if the schedule is covered adequately and each case should be handled individually by the person responsible for the schedule. No exchanges should be permitted without reference to some responsible member of the department.

*Illness* and unusual absence of staff members create emergencies calling for a rearrangement of the schedule, and the assistant who has been treated justly can be relied on to rise to the occasion in such crises.

## 5. Sunday and holiday schedules

When the public departments of libraries are open on holidays and Sundays, it is much to be desired that the assistants on duty be members of the regular staff, familiar with the routine, regulations and resources of the library. It may be considered necessary to have the head of department or first assistant available in the building at all hours when the library is open. If books are not circulated on Sundays, a minimum staff is assigned to duty. The staff in some systems receives extra pay for Sunday service and volunteers are often called for. If the remuneration is adequate,

no difficulty is experienced in securing a sufficient number of assistants. When no extra pay is offered, the staff may be divided into groups and assigned to duty in rotation. If Sunday duty is not regularly included in the hours of service for the week, a like number of free hours chosen at a convenient time during the week are ordinarily granted assistants for Sunday service.

The same general arrangements apply on Sunday and holidays if books are circulated, except that a larger staff is needed to carry the mechanics of circulation. In an effort to reduce the number of assistants on duty, it is common practice to omit on such days all the usual routine clerical work that can be postponed.

The use of the library on holidays varies widely. Such days as Thanksgiving and New Year's Day are usually observed with a general cessation of all business and industrial activities, since these are days when families often make plans in groups. Libraries therefore may not be busy. Other holidays, less generally observed, send many people to libraries. Each holiday schedule will thus need to be arranged with a view to the call that the public is likely to make. Statistics of use in previous years, kept on file in most libraries, will aid greatly in planning holiday schedules.

### III. SHELF WORK

The ultimate usefulness of any library depends on the ability of the staff and the public to find books on the shelves with ease and assurance. Theoretically, books should stand on the shelves in the exact sequence indicated by their call numbers, or by author and title, in strict alphabetical order. This arrangement usually corresponds exactly with that of the shelf-list and with that of the file of book cards for books in circulation. The *fixed location* of books in old libraries gave every volume its own place on the shelf, which stood empty when the book was out, and to which the volume was returned. The *relative location* of a book in connection with other books in the same class is now regarded as the important factor in shelving. Books are usually kept in order

by shifting them to fill vacancies on the shelves, as well as to make space for the return of any volume and for new books added to any class.

## 1. Organization

Except in very large libraries, the circulation department devises the necessary routine and distributes the duties attached to shelf work. In large collections housed in great buildings, with numerous and widely scattered stacks, shelf work becomes so complicated that a separate department is often organized to care for it. For purposes of this book it will be considered that the shelving of books is a function of the circulation department, administered as are other duties of that department and included in its schedule of work.

## 2. Shelving books

(a) *Sorting and arranging.* The assistant who slips a returned book may do the first preliminary sorting by placing the book on a book truck or in another designated place, so as to indicate the department, special collection, or general class to which it belongs. Fiction is usually separated from non-fiction; non-fiction in turn may be arranged roughly by class number. Each book is carefully inspected for needed repairs or rebinding. Slipped books are allowed to accumulate until their numbers justify removal for shelving.

Before the books are put in place on the shelves, they must be arranged in some order in a place reserved for this purpose so that they will be easily available and so as to facilitate shelving. In small libraries a book truck or the end of a desk may be used for this work. Or, temporary or return shelves for books may be conveniently near the circulation desks and stacks and may be used for a further and more careful sorting preparatory to shelving. Return shelves are accessible to the public in some libraries, where most of the circulation is from open shelves. Readers like to see

the books that are being read by others and titles which might otherwise be overlooked often suggest themselves from such a miscellaneous collection.

The final process involves the use of a book truck on which the books are arranged in the exact order in which they will stand on the shelves. The truck is then wheeled to the shelves and the books are transferred.

(b) *Verifying slipping.* Accuracy in slipping books returned by borrowers is a matter of such importance both to the library and to the borrower that many libraries consider it good practice to verify this process before the books are shelved, despite the effort involved. When slipping has been carefully verified before shelving, the search of shelves for overdue books may be omitted before sending first fine notices.

There are two accepted ways of verifying slipping, first, as a part of the slipping process, and second, as a part of the procedure of shelving.

First: Some libraries assign this work to responsible assistants who have not slipped the books to be inspected. The call number or accession number of non-fiction and the accession number or copy number of fiction, found on the book card and the book pocket, are compared. The physical condition of each book is noted carefully. After this inspection the books are ready for shelving in their regular places or on the temporary shelves preliminary to shelving.

Second: When the page or assistant who shelves books is also responsible for verifying the slipping, the check may not be made so meticulously. As the books are sorted, or just before placing them on the shelves, each is opened to see that a book card is in the pocket, and the proper numbers are examined. Since this verifying is done just prior to shelving, it is sometimes possible to catch unslipped books which have been misplaced through accident or carelessness.

(c) *Arranging books on shelves.* The arrangement of books on the shelves will be determined by the size of the collection,

though the same principles are applicable to any library. Whether all books are assembled in one arrangement or divided into many collections, it is usual in public libraries to arrange fiction and non-fiction separately. Fiction is arranged alphabetically by author's last names, and then by titles of books, or by book numbers. In shelving fiction written by authors with common names, the authors' forenames may be considered so that all books by one author stand together, and the books may be further alphabetized by titles. Some libraries compromise on this point, merely keeping together all books by authors of the same surname. Non-fiction is arranged by call numbers, each being compared with those of the books on both sides to obtain the correct sequence. Volumes belonging to sets must be kept in numerical order.

The general appearance and orderliness of the shelves may with some justification be assumed by the public as evidence of the effectiveness of the system. Hence it is good practice to combine *straightening of shelves* with the actual replacing of returned volumes. Straightening a shelf consists in drawing all books forward and even with the edge of the shelf, and shifting the volumes so that they stand upright, with all empty space at the right hand end of the shelf. A book support at the right end of the row of books is essential, of course. Any books needing rebinding or repair should be removed. All books left on top of shelves or behind them should be put in place. When books are crowded they should be loosened by shifting volumes to the shelves above or below. Space for growth should be allowed at the right hand end of each shelf. Tight shelves discourage the borrower in two ways: first, he may experience the difficulty of accidentally pulling out several books in his effort to examine one; and secondly, he may feel that the volume he meant to take must be very uninteresting since so many of the same type or treating the same subject stand wedged in on the shelves.

In training the new page or assistant to shelve books, strict *re-vision of shelving* is necessary. The beginner must know the alphabet, which is not always taught in schools, also the decimal



number sequence. Since book cards and books are arranged alike, the student may be allowed to arrange book cards until the idea behind the process is mastered. The next step may be practice in arranging books themselves, on a truck or on a vacant shelf. Until the routine has become familiar, the page or assistant may shelve the book in the correct position and turn it down on the front edge. A member of the staff then examines the shelves and turns up the book if correctly placed, or calls attention to errors. When the page or assistant has become sufficiently expert to proceed without revision, the need for speed and accuracy in shelving may be stressed.

The work of shelving is often done by pages, either boys or girls, employed for part time or full time by the library. Because of the small pay and the rather arduous work demanded, the pages change frequently. The staff member who supervises these employees must be able to manage them with understanding as well as firmness. If a certain pride in the work can be aroused by stressing the larger importance of shelving books correctly and if the young person's interest is stirred and his faithful effort rewarded with even slight increases in salary, he may give a real cooperation, helpful to the morale of the whole department. All assistants should realize that patience and consideration are due the page and should make every effort to help in maintaining order on the shelves.

### **3. Labeling shelves**

Shelf labels contribute greatly to the speed with which books can be shelved and found and ultimately with the successful use of the library by its readers. Common practice advocates that the ends of each floor stack be labeled for the general classes contained. Labels should be introduced above each section of shelves, indicating class numbers—general, specific or inclusive, as needed—and individual non-fiction shelves should be labeled similarly. Labels for important authors appear on fiction shelves. All labels must be moved or changed as the books on the shelves are shifted,

and replaced when soiled or worn. They may be made by hand or with rubber stamps to suit local needs, or printed labels or gummed letters may be purchased from regular library supply houses. Like the guide in the card catalog, the shelf label indicates what is to be found between it and the next label, and for this reason it should be prominent and plainly legible.

#### **4. Shifting books**

Constant minor shifting goes on in order to avoid the crowding of shelves and uneven distribution of books, or to change the position of small collections of books to meet special demands. At intervals when the gradual growth absorbs the space originally left vacant on each shelf, redistribution or rearrangement of the whole or a large part of the collection may be required. Perhaps additional shelf space is made available, or the collection is subdivided, and thus certain sections can be spread over more space. A survey of the whole situation should precede any general shifting, and a plan must be carefully arranged so that each shelf will be left with sufficient space to care for additions.

#### **5. Reading shelves**

Shelves are read in an attempt to keep books properly arranged. This procedure is necessary in any library, but the need increases tremendously whenever the reader has the privilege of browsing among the books. The staff may endeavor to train borrowers not to return books to the shelves, but the obliging reader cannot resist slipping a book into a vacant place on a shelf though it may be nowhere near the spot where the book belongs. In busy open shelf rooms, eternal vigilance is for this reason required on the part of assistants searching for books. In large or medium-sized libraries with growing open shelf collections, shelf reading should go on constantly, with particular attention to the fiction shelves. In small libraries books may be kept in correct order with less frequent inspection, especially for adult non-fiction.

In reading shelves, the relative position of the book on the shelf must be considered and all titles put in correct order. In some libraries shelf reading is done chiefly by pages regularly assigned to this duty at stated hours of the day. In others the staff, particularly the less experienced members, are scheduled for a certain amount of shelf reading each week. It may be done also as pick-up work during dull hours. The advantage of careful shelf reading for any staff member lies in the increasing familiarity thereby cultivated with books and their location on the shelves.

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Differentiates between legitimate short cuts and labor saving at the expense of readers.

#### THOUGHT QUESTIONS

1. Enumerate the factors which affect the administrator's division of work among the staff. Which factor seems to you to be the most important? Why?
2. State the advantages and disadvantages of receiving all incoming telephone calls at the circulation desk in a medium-large public library.
3. Organize in some detail for the use of a page a plan of procedure in a medium-sized library for:
  - (a) Shelving books,
  - (b) Slipping books,
  - (c) Reading shelves.
4. Discuss the relation of verifying the slipping of books to (a) the sending of overdue notices; (b) the correct shelving of books.
5. Criticize the type of work likely to be done, (a) by a desk assistant who has not mastered routine work so well as to do it almost unconsciously; (b) by an assistant who performs routine as automatically and perfunctorily as a machine.

6. Outline a plan for keeping a record of, and delegating pick-up work at circulation desks, so that every assistant may find something to do when not otherwise occupied.
7. Compare the advantages of a permanent schedule with those of one changed at frequent intervals.
8. Make a time schedule for one week for a circulation staff of five members. Consider that the registration desk is separate from the circulation desk. What difficulties do you encounter?

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## CHAPTER 11

### Statistics and Reports

#### I. STATISTICS

1. Count of books circulated
2. Count of clerical work
3. Count of registration
4. Count of attendance
5. Statistics of fines and fees

#### II. REPORTS

1. Regular reports
  2. Special reports
- 

#### I. STATISTICS

The question of statistics, their use and abuse, has long been the subject of animated discussion and debate among librarians. Most libraries collect and publish more or less detailed accounts of their varied activities. Governing boards and city authorities are interested in the use that is being made of annual appropriations from public funds, and must have exact, clear, and easily understood statements. These need not be mere tables of figures, however. Since these reports are intended to record library activities and to show community benefits derived from expenditures, it should be possible to make them not only broadly inclusive but interesting as well. The most definite and tangible statistics of library use available are those recording the various phases of circulation work.

The compilation of circulation statistics with an over-emphasis on totals suggests a failure to grasp their real purpose. A correct estimate of the relative value of the statistics kept is essential. The ability to interpret and to make interesting the fundamental information included in records of use may result in a real benefit

to the library. The number of books read by a community, the number read by children or adult readers, the percentage of fiction or any other class of books read, the number of books circulated in the busiest day or in the busiest month of the year, all may be matters of public as well as library interest, and this information should be readily available.

Comparisons both within the library and with other libraries are often significant. Thus this year's work measured against last year's may show gains which justify requests for increased appropriations. A wider comparison, contrasting the use of the local library with that of other systems, is often more than a matter of mere interest. In order to accomplish these various purposes, figures showing use and growth must be assembled and kept on regular, standardized forms.

Uniform methods of counting the circulation of books and related material, as well as of compiling other library statistics, have been devised by the Committee on Library Administration of the American Library Association, which has issued a "Revised form for public library statistics," with notes, definitions and rules to make the procedure clear. This form is in common use in public libraries, and local methods have often been entirely rearranged to meet its requirements. This standardization of records has saved libraries the necessity of making local forms and provided a basis for comparisons otherwise impossible. Such additional figures as may be required to meet definite and important local demands should also be kept. But beyond that point may lie the danger of exaggerating the value of statistics.

There are five essential forms of circulation statistics, involving records of: (1) books circulated; (2) clerical work; (3) registration; (4) attendance; (5) fines and fees.

### 1. Count of books circulated

(a) *Count of charges to individuals.* A distinct part of the clerical work of the circulation department is the necessary compilation of records showing the number of books charged to bor-

rowers for reading outside the library. Mounting figures, indicating significant increases in volume of work, may be observed from time to time, but should not be regarded as the end or aim of the day's work. A service must be found at the circulation desk which cannot be tabulated with the number of books charged for home use if the library is to occupy its proper position among the educational forces of the community.

Statistics of circulation are compiled from a detailed count of book cards representing books which have been taken out each day. This work is usually done once a day, when all book cards have been sorted and arranged and before they are incorporated in the general file under the date. Common practice suggests that the process be carried through as a whole the first thing in the morning for the circulation of the preceding day. However, in some libraries it has proved more desirable to record as much of the day's count as possible during dull hours. Ruled forms are arranged on which to enter figures of use and usually include spaces for the entry of the daily count for a calendar month. At the end of the month the daily records are totaled and balanced and put into permanent form on sheets or in books. All the figures compiled and entered daily should be carefully balanced so that when a periodical summary is made, the accuracy of the figures need not be questioned. Under the American Library Association requirements, adult and juvenile statistics are kept separately. In both reports fiction and each class of non-fiction are counted and recorded separately. Other types of material frequently recorded as units in the total are magazines, foreign books—which may be subdivided by language—pamphlets, pictures, photographs and prints, sheet music, clippings, and rental books.

A separate count of the circulation between six P. M. and the closing hour may serve as an index to the relative evening use of the library. Such a record as this need be made only at irregular intervals for a short period as a check on the use of the library. Books charged for vacation, books reserved, or other special privi-

lege charges may also be recorded as units before counting them in the classes where they regularly appear.

Variations in the handling of statistics are readily suggested by differences in the sizes of libraries. For example, weekly totals entered on permanent records may serve as the basis of monthly summaries. In many libraries adding machines facilitate the keeping of accurate statistics.

In *large libraries* the record of circulation is often kept at each point in the system where books are charged. The daily count, recorded on a temporary slip, is totaled at the end of the month and sent to a central point at which all records of circulation are accumulated. In assembling these records various local differences govern the form of statistics kept though they are usually as simple as the needs permit. An accurate count of circulation at county stations, separate for each station and for the county as a whole, is usually maintained. If county extension work is based on a contract, as has been previously described, the income of the library may be governed by the use evidenced by statistics of county circulation.

(b) *Count of intra-system loans.* The perplexing problem of counting books lent from one point in a system to another has been covered by the recommendations of the American Library Association Committee on Library Administration. These requirements stipulate that the act of sending a book from a main library to a branch or to a station of any kind, no matter what the length of the loan, may not be counted as an issue in the general circulation of the library, although a separate record of books thus sent should be kept. These books, when issued by a station or branch to the reader, should be included in the regular count of books charged from that agency. No libraries count in the regular circulation the use of material within the library, that is, books which are taken from shelf to table for examination, study, and reading.



## 2. Count of clerical work

A daily report of clerical work is usually included in the statistics of the circulation department. Thus are recorded the number of first, second, and third overdue notices, as well as the messengers sent and the results of their visits. The count of reserve notices may be divided to indicate the number of books reserved for readers and those which are reserved to meet intra-system or inter-departmental requests. Additional statistics may be kept of miscellaneous clerical work such as writing filled cards, changing addresses, etc. All figures are totaled at the end of each month and included in the general report.

## 3. Count of registration

The registration records of any library should show the number of borrowers using the system, not only to answer local questions but also as a means of comparison with other libraries, and to conform to American Library Association requirements. In most libraries the records show the count by agencies at which borrowers are registered; also the number of juvenile, adult and re-registered borrowers in separate totals. In order to keep these figures accurately a classified daily report is usually made. Each branch, when sending in registration records for the union files at the main library, makes its own detailed records. At the main library a report of totals is entered each day and a compilation for the system is made at the end of each month. Records of transfers from the juvenile to the adult department and of transfers of borrowers from one branch to another may be included in the summary report. Temporary and non-resident borrowers and other special classes of users may also be counted and recorded separately.

In order to record accurately the number of registered borrowers for any given period, the registrations which have expired during the period must be deducted from the total registrations. This difference added to the last record of registered borrowers

should give the correct number of cards in force in the library system. Cancellations may be figured in block as borrowers' numbers automatically expire, and deducted from the total for the whole system, though common practice suggests that each branch deducts from its record the cancellations occurring in its own registration.

The forms for recording these statistics are again usually devised to meet American Library Association requirements and local needs as well. Many standardized report blanks are available for purchase and may be altered to suit the immediate purposes of the library.

#### **4. Count of attendance**

In some libraries a count is made of the number of people who use the various rooms. The practice is more common in large libraries, where the count is sometimes made in special departments only, to estimate the use of collections. The count is made by those assistants on duty at given desks who record the number of people who enter the building or the room, or who ask questions, or who are seated at tables. Such a record may be kept by hours to show the comparative use at different times of the day, or by days, or periodic counts may be made to serve as a basis for estimating the total or for making comparisons.

The number of borrowers coming to the library on Sundays and holidays is often recorded since justification for opening may depend on the number of people using the library on these special days. The librarian who wishes to enlarge his service may find such statistics necessary.

#### **5. Statistics of fines and fees**

Financial transactions of the circulation department have been discussed in general in Chapter 6 of this book. As has been stated, variations are numerous in the methods of recording cash receipts. But whatever the variations, an itemized daily report based on

the cash record should be made, with the accompanying cash turned over to the library office.

Since funds for public library maintenance are usually appropriated by the municipality, the auditing of records becomes imperative at such times as the city balances its books. Details of cash records are often regulated by requirements laid down for city reports, and the form adopted is usually that suggested by the auditor who handles the library funds.

Separate entries are usually made for the following items: fines, which often include the fees collected for minor damages to books; rentals, in order to show the earning capacity of these books; fees for reserve notices and duplicate borrowers' cards; non-resident fees including the date to act as a guide to re-registration; money received in payment for catalogs, bulletins and other publications. Permanent record should also be made of lost books. Full detail is necessary here, not only to assist in completing the final withdrawal of a book from library records, but also to furnish the name of the borrower involved in the transaction. For instance, when a lost book is found and returned, full information is necessary to help in deciding whether or not the sum paid is to be refunded.

If disbursements are permitted from the cash collected at the circulation desk, these must be itemized in the daily report. Clear instructions for handling and recording such expenditures must be posted plainly to forestall a misunderstanding.

The amount of the funds handled in any library may determine the method of transmitting the records and the cash to the library office, where they will be permanently recorded. The cash receipts for the day may be sealed in a manila envelope with the totals itemized on the outside, and be kept untouched until the cash can be balanced. By another method the items and the total of the day's receipts are entered in a notebook in ink, signed by the initials of the assistant making the entries, and turned over to the library office with the cash, where the record is checked for correctness.

## II. REPORTS

## 1. Regular reports

The statistics collected by a library serve as a basis for the reports required at regular intervals by the administration. The interpretive value of these reports makes them important to the circulation as to all other departments. The report of the circulation department forms a unit in the report of all library activities, showing the relation of circulation work to that of the library as a whole. All comparisons and all interpretations and explanations of fluctuations in use will be matters of interest and important in their relation to details of administration.

(a) *Monthly summary of daily statistics.* In most libraries a summary of daily circulation statistics in the form of a balanced report is prepared at the end of each month. This includes not only totals but also percentages of the use of various classes of books and such other compilations and comparisons as local practice requires.

All branch, station, and other extension reports are usually sent to the main library for inclusion in the summary compiled for the system. These monthly summaries of all daily statistics are commonly turned in to the librarian for such use as he may make of the figures. Boards of trustees often require the information supplied by them; newspapers find items of interest in statistics; and many other uses may be made of these figures from time to time. In some systems facts and figures dealing with the circulation department may be presented each month in narrative form for use with the public. Thus an effort may be made to familiarize readers with some of the interesting details connected with the internal work of the circulation department. Circulation reports may be one of the determining factors making clear the need for increases in the staff to carry the work of the department.

(b) *Annual reports.* The annual report of a public library maintained by a municipality is usually called for at the expiration

of the fiscal year so that it may be included in the general accounting of the city activities made at that time. When libraries are not departments of the municipality, an annual report is required of the librarian by the governing body. Annual reports are printed and distributed by larger libraries; in smaller communities the local newspapers may print them in detail. In either case, the account of the year's work should be thoroughly intelligible and interesting to the public in order that the publicity resulting may be of real benefit to the library.

The circulation department contributes its annual report to be incorporated in the complete annual report of the institution. This is usually a summary compiled by adding the totals of monthly reports. The head of the circulation department may include with the annual statistical report to the librarian a narrative containing such comments on, and estimates of, the personnel and work of the department as will summarize progress for the year past and suggest the outlook for the year to come. Every assistant in the department may be called on to cooperate in the survey of activities and the outline of progress thus included.

## **2. Special reports**

Circumstances arising in the administration of a library may call for special information which in turn necessitates additional reports for a definite period or purpose. For example, when a question arises as to opening the library for a longer period of hours, a record of the use of the library hour by hour may enable the librarian to prove his point one way or another. The circulation department may be asked to make a special count of circulation during certain hours at particularly busy desks to prove the need for additional assistants at these posts. Groups of people with special interests may justifiably request a special count of the use of certain classes of books during certain periods. The statistics of any circulation department should be so arranged that within the limits of the information which they are planned to

supply, any reasonable question may be answered. This means that each day's work must be recorded completely and accurately.

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Discussion of the perennial fluctuations in reading and in the use of libraries.

### THOUGHT QUESTIONS

1. Should the statistics of a public library include a separate record of registration for branch borrowers and county borrowers? For re-registration as well as registration? Why?
2. What dangers may arise in the attitude of the assistant to the public if undue emphasis is placed on the number of books circulated?
3. Secure blanks for circulation statistics from two or three dealers in library supplies, and examine them carefully. Would you modify any one of these forms for use in a library of medium size; in a small library? Why?
4. List five questions which may be answered through a comparison of the statistics of circulation.
5. What relations may a desk assistant have with the work of compiling the statistics and preparing the reports of the circulation department?
6. Secure the published annual reports of three large libraries. Compare the sections dealing with circulation and extension work for

information supplied, form of report and general interest. Criticize one report and show how it might be made more interesting to the public.

7. What are the essential differences in content and purpose between a monthly report and an annual report?
8. Devise a form which seems to you adequate for recording cash items in a medium-sized library. How would you change this form for use in a small library?
9. Name three occasions when a library might use special reports upon circulation work at given points or hours. Outline a plan for making one such report.

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## CHAPTER 12

### Administration of Circulation Work

- I. RELATIONS WITHIN THE LIBRARY
    - 1. Policies of organization and administration
    - 2. Selection of staff
    - 3. Equipment and supplies
    - 4. Inter-departmental relations
  - II. RELATIONS WITHIN THE DEPARTMENT
    - 1. Organization of work
    - 2. Organization of staff
    - 3. Instruction to staff members
    - 4. Staff meetings
  - III. DEPARTMENT HEAD AS AN INDIVIDUAL
- 

#### I. RELATIONS WITHIN THE LIBRARY

The circulation department, at one time concerned merely with supplying books to those asking for them, has now become aggressively useful. The years of change that have taken the public library out of old, cramped quarters, little musty rooms with mattings on the floor, and put it into a building of its own used every day by hundreds of active, important people, manifests a growth that is reflected with special emphasis in circulation work.

The responsibility for administering the varied activities which have grown as the circulation of books has increased, centers naturally in one individual, and whatever the differences in size or type of organization, these duties are basically the same.

In small libraries the librarian often includes the administrative duties of the circulation department with those of the library as a whole. He selects and organizes the staff, and distributes responsibility for the work. The choice of equipment and supplies will also lie in his hands, and all other details of staff supervision, instruction, and development. Problems of organization



are determined in keeping with the established policies of the library.

In larger libraries a department head usually discharges these administrative duties connected with the circulation of books, standing as an intermediary between the librarian and the staff of the department, and often between the librarian and the public. In very large systems this individual may be immediately accountable to an assistant librarian, a division chief, or a supervisor. But whatever his relations with those exercising greater authority, the head of the circulation department should be first and last the representative of the circulation staff. He should be a leader with training, experience, and an understanding of his relation to the library staff as a whole, to the circulation staff in particular, and to the public. The middle ground is his. The interpretive function of this position calls for mature judgment and wisdom in dealing with people young and old. In the eyes of the public he represents books and the service which makes them available. As a member of the general staff he must keep in close touch with all activities in any way related to the department. He must see that even a suggestion of unwholesome rivalry with other departments does not exist. He must have a genuine interest in all library affairs. He must introduce into actual practice the policies and procedure bearing on the circulation of books which have been determined by the librarian, the board of trustees, or in conferences in which he takes part.

For the purpose of this chapter, the duties attaching to the position of department head in a medium-sized library will be considered, always with an effort to state practice or procedure which can be simplified for use in small libraries or adapted for larger systems. In connection with the latter it is recognized that they may have need of clerical assistants to supplement the circulation staff in the performance of purely mechanical duties and that graded service will probably be required.

## 1. Policies of organization and administration

In *organizing a circulation department* where none has previously existed, or in outlining a whole plan of work in a new library, the head of department or librarian will base the scheme recommended for adoption on the size of the library, the resources available, a survey of immediate library and community needs, and of possible future demands. One of the first general problems to be considered is the choice of a system for charging books, and for registering borrowers. This should take into account the simplicity and adequacy of records and operations, economy in time and labor, convenience to public and staff, accuracy, speed, and general adaptability to the needs of the library. Another problem of equal importance is concerned with the plan for the physical layout of the department, including the loan desk, files, and other furniture and equipment. Hours of opening must be determined, not only regular hours but also hours of service on Sundays and holidays. Rules and regulations governing desk routine as well as borrowers' privileges must be set down in permanent form. The size and personnel of the circulation staff in proportion to the whole staff must be considered. Clerical duties can be more accurately and rapidly performed out of sight of the public. Hence, a well lighted work room equipped with desks may be regarded as essential in the circulation department. This office or work room removes from the desk the assistants not needed to serve readers.

On this framework must be built a flexible department, equipped to meet the demands put upon it. The outline of organization, revised and perfected, will be submitted for the approval of the librarian, and in some cases, of the library board. Details of this organization will be elaborated in the succeeding pages of this chapter.

The *head of the circulation department*, who assumes charge of an organized department, will wish first of all to become thoroughly familiar with departmental procedure, local problems,

and the established ways of meeting them, and with the personnel of the department and the library. Modifications of the established system which seem essential should be put into effect gradually and conservatively. Possible alterations in procedure must be considered in the light of policies affecting the entire library system, especially in a system striving to maintain uniformity of practice in all its agencies.

A clear understanding of all that is involved in the relationship between the head of department and the librarian is a preliminary requisite of great importance. The size of the system will have much influence on the contact necessary between the department head and the administrator, but whatever the organization, access between these two individuals, and free discussion of problems and policies should be easily possible at all times. The head of department will realize that time and effort can be saved, and better results secured in conferences if the problems to be discussed are logically organized in advance. If he has opinions and suggestions based on experience and bolstered by study and careful thought, the interview may be most effective and usually favorable to his own views. His manner of presenting the questions involved also may help in solving them. In these relations there is needed further an ability to weigh daily occurrences, sound judgment in determining which questions require consultation and discussion, and a correct estimate of personal duties and joint responsibilities. In most systems matters concerned with library policies reaching beyond the circulation department should be the subject of conference with the librarian. In addition, departmental problems worthy of combined attack and of the time required for their discussion should be considered at the opportune moment. Matters of detail, dealing with minor general rulings, may well be settled by the department head independently, after such conferences with the staff as seem advisable. The departmental executive who takes the assistant into his confidence often stimulates a certain mental freshness in the latter and thus secures much more than the mere opinion sought.

In the day's work many questions come to the head of department through contact with the public and with the assistant who needs help in handling requests. Matters of outside community interests are frequently brought to the department head because of his accessibility. These are often of sufficient importance for immediate reference to the librarian in order that some official connection may be made. Because of this close touch with many public activities the head of the circulation department is in a position to relay much important information to the librarian and often to direct possible contacts to other library sources from which best results may be expected.

In his *relation to the staff* of the department, the executive has a definite responsibility for the varied duties attaching to circulation work, for attitudes to service, and for the guidance of assistants. Ingenuity, keen intellectual zest in work, enthusiasm for diverse opportunities, familiarity with policies and methods, and knowledge of the personal characteristics of each member of the staff suggest the requirements and also the advantages of this position.

In relation to the librarian or to other department heads, the duties of the head of department are primarily cooperative, calling forth the power to observe, to suggest and to transmit to those having little direct contact with the users of the library, a sense of the real needs of readers. In relation to the circulation staff, he is an administrator, needing an unusual share of tact because his word, while carrying authority, may not be final.

In any department of the library, especially one making public contacts, the organization of the work is but the first step toward the actual performance of the duties of the department. The test of all the theories set down in a plan of department work comes when the records and procedures must be used by staff and readers. No organization should be accepted as final, no matter how effective. Changes on either side of the circulation desk must be reflected in the scheme of work, which should be under constant surveillance if the ends, to which it is a means, are to be

accomplished. The constant necessity of adapting routine processes to meet the new needs of the system requires that the administrator be a person with stable judgment, a flexible, open mind capable of a conservative yet progressive attitude toward suggested alterations, able to foresee and weigh probable results, shrewd in observation of people and things, fully aware of the strategic position which he occupies in the library and the community.

The *cost of administering* the circulation department is a matter of importance to the department head. Every branch of the service, each detail of procedure, should be weighed to see whether it is worth its cost in time, effort, and money, and to judge its relative importance in the whole scheme of work. If the expense is disproportionate, the department head must devise an alternate procedure. For example, the cost of caring for renewals and of overdues may raise the question of extending the period of loan from fourteen to twenty-eight days. If local conditions favor the longer loan, the department head may feel justified in suggesting the experiment and may keep close watch on results in order to make a final report on the success of the experiment. Although no visible outlay of money is involved, yet the assistant as well as the department head must realize that a wise economy of both time and library funds is imperative and that each member of the staff should, in watching his own particular work, compare efforts with results.

## 2. Selection of staff

In the choice of the staff for the circulation department, application may be made of the new personnel techniques being adapted for library use. The department head with high ideals for public service should be asked to participate in the selection of the assistants assigned to circulation work, whether the librarian or a special member of the staff is in charge of personnel. Certain general educational standards will be set, and the circulation assistant should be measured in the light of these requirements.

Professional education, experience, and personal traits are all matters of great importance to the librarian. In some systems the information and impressions obtained through correspondence or interview may be supplemented by a work trial to determine special fitness for the work.

If the assistant assigned to the circulation department has been a member of a training class in the library, the director of the class as well as the supervisor of practice work in the circulation department should have definite views as to his fitness. The limited experience of newly trained assistants makes it necessary to consider carefully their personal and intellectual traits and endowments, and to estimate their capacity for further education. The promise of an ability to adapt theory readily to practice must be at the basis of any selection. As a further aid in selection the department head may need detailed reports from those who have observed the student's characteristics and attitudes. From an analysis of these reports, evidence of special ability for circulation work may be gathered which will help to winnow the right assistants. Only a small number of new and inexperienced assistants should be appointed to circulation positions at one time, since each person adds the necessity of teaching to the regular duties of those working about him.

With these general suggestions in mind, the student is referred to Chapter 13 of this book, where a careful analysis is made of those personal traits necessary for successful work in the circulation department. The department head will welcome the possibility of using these findings in measuring the assistant who is being considered for circulation work. A further use is also outlined for the student or the assistant interested in self-measurement.

### **3. Equipment and supplies**

Every well organized circulation department provides an effective routine for maintaining a stock of supplies which must be

secured and kept easily accessible in anticipation of actual need. Maintenance of equipment must likewise be watched. If space at the desk is limited for the storage of printed forms, dating stamps, ink and ink pads, and all the paraphernalia essential to circulation work, a reserve stock must be available elsewhere. Large libraries usually maintain a special stock room from which each department may requisition supplies by listing material needed on a blank provided for this purpose. Printed forms are ordered by form number or by name. The name of the department appears on the requisition and the department head may sign this in order to check the amount of various materials being used. The cost of all supplies and equipment may also be a matter of definite record, since information as to the cost of departmental maintenance is usually required, especially in larger libraries. In order to place responsibility and make this service most effective, the duty of checking supplies and signing requisitions is frequently assigned to one staff member.

The procedure of handling supplies will depend largely on the size of the library and the arrangement of the desk, but a thorough check must be made at intervals so that supplies are not altogether exhausted. A definite relation will be found to exist between book circulation and the consumption of supplies, and any unusual demand on supplies should warrant investigation by the department head.

As it becomes necessary to reprint or reissue blanks and forms, the department head should consider each form for such possible alteration as has been demonstrated to be needed and practical. In this way all the supplies necessary for circulation work automatically come to the head of department at fairly regular intervals, and each form is measured again for its usefulness. Alterations suggested by the staff in the course of their work should be noted as they occur and filed for consideration when the forms are to be reissued.

The physical equipment of the department, that is, all furniture, shelf labels, lights, etc., must be surveyed and kept in order.

The need for new furniture or radical changes in the position of desks or for other alterations in the arrangement of the department usually necessitates a consultation between the department head and the librarian.

#### 4. Inter-departmental relations

An effort has been made throughout the preceding chapters of this book to stress the proper position of the work of the circulation department and its relative importance in the unit which is the library. The broad reach of circulation work can be demonstrated in no better way than by considering the active cooperation which should exist between this department and all other departments included in the library system. For instance, cooperation with the order department may prove very important in arranging for placing book orders, and also in reporting anticipated demands, so that the necessary additional copies of books can be provided. Again, the department head is expected to share with the administration in planning staff meetings, as will be later elaborated, and in contributing to the conferences in which he participates. Conversely, an interest in the general regulations of circulation on the part of the whole library staff may be taken for granted by the department head.

*An exchange of assistants* must frequently be resorted to in emergencies. In practice, the circulation or other public departments, where the public must be met and served, is forced to do most of the borrowing since schedules must be covered and desks manned, whereas the work of other departments, although equally important, may more easily be interrupted. The experienced assistant from another part of the library should know his way about at the circulation desk and, for this reason, notices of changes in procedure and privileges should be clearly and definitely formulated and posted for the information of all staff members. Demands for borrowed help will be made as seldom as possible and for as short a period of time as can be managed.



A close touch with the use of the *catalog* by the public may be maintained through the circulation assistant. This may be effected through a periodic exchange of assistants between the two departments, the cataloger being stationed at the public catalog to aid readers and observe the use of the catalog, and the circulation assistant being called in to assist in the catalog department as far as possible, and thus educate himself in the mysteries of that craft. This is accomplished effectively in at least one library by keeping a two-column notebook at the catalog in which assistants may enter queries and problems. The book is examined at regular intervals by a member of the catalog department, who notes opposite each entry the answer to the question raised. For example, inquiries often come for books and material on a subject not listed in the catalog. If these requests are transmitted to the catalogers, an effort is usually made to include such entries as will be useful to readers. If the assistant signs the queries or notes in the catalog notebook with an initial or symbol, his attention can be called to the answers and his knowledge of the catalog increased. Through the answering of these questions the circulation assistant learns something of the cataloger's problems and the cataloger gets concrete evidence of the readers' difficulties in using the catalog. Both departments as well as the public profit by the better understanding.

Many requests come to the head of the circulation department for material to be used in all sorts of *publicity*, for example, human interest stories and every kind of library happening. In smaller communities the new newspaper reporter turns to the library for something of perennial local interest about which he can write. The value of this public attitude is too great to be disregarded, and real tact must be shown in handling these requests. As has been indicated in Chapter 9, a definite policy in regard to publicity will regulate the activities of the department in these channels. The department head and perhaps each assistant will contribute to the general library publicity, and experience will prove the value of devoting adequate time to assembling and or-

ganizing publicity material. A written statement carefully prepared will often prevent the possibility of misquotation.

The cooperation of the circulation department in *book selection* will vary according to the size of the system, and the organization of this work. In many libraries today books are selected through conferences of heads of departments or divisions, and branch librarians. In other systems the chief work of selection is done by the head librarian. In still others the head of the circulation department has much of the responsibility of choice. In any case, the librarian is the final authority, but a cooperative attack of this important library problem brings the best results. Since the head of the circulation department reflects public demands, sees the forces that influence popularity, knows the necessary relation between supply and demand, and can estimate an ephemeral, artificially inspired run on a title or group of books, his opinion is usually worth some attention in book selection conferences.

The circulation department is often actively concerned with certain features of the routine of selection in cooperation with both the selection staff and the order department. This may involve a regular checking of current book reviews and other regular publications suggesting new titles, as for instance, the *Book-list*, *Publishers' Weekly*, and *Book Review Digest*. Borrowers' recommendations for book purchases are also received at the circulation desk and often checked and forwarded. Requests for books to be rushed for special purposes are usually expedited by the department head, as are also recommendations for additional new magazines or copies for circulation, if this practice obtains.

In addition the head of the circulation department must secure as quickly as possible the new books which are constantly requested. Also the question of *duplication* is never settled, as the demand for titles increases and copies of popular books wear out and require replacement. The number of reserves on file for any title often serves as an index to the number of copies needed, though the price of the book may limit the number of copies the library can have. Standard books of perennial popularity must be closely

watched, if discarding and loss from shelves is not to deplete the stock so seriously as to impair the library's usefulness. Inexpensive editions may often be bought in quantity and released as need develops in the system. New and attractive copies of books whose first appeal may seem past but which are worth a special effort to circulate are often absorbed into circulation at a surprising rate.

Since the book collection and its use constitute the chief and vital concern of the head of the circulation department, his part in its development should reflect in every possible way the results of all his observations of community life. He will try to strengthen weak spots, to attract readers by displays revealing the extent and variety of library resources, and to make the collection sufficiently comprehensive to meet and stimulate all types of community interests, whether these be cultural, educational, industrial, or commercial. It must be built to satisfy youth and age. And it must be used to draw to itself more and more of the people for whom it is built.

## II. RELATIONS WITHIN THE DEPARTMENT

It is necessary that the student of circulation work comprehend the reasons underlying those relations within the department which build an organization of such balance that the service moves smoothly forward without visible interruption, regardless of complications in personnel. The student needs further to understand that a continual study of results must be maintained even after the staff has been carefully selected and an effort has been made to assign to each person the duties which he is best qualified to perform. The student must realize that to the position of department head appertains the immediate responsibility for the department as a whole. A wise person occupying this position and administering the work of a group of assistants of varying qualifications keeps many fine points in administration constantly in mind. He must know each assistant, his capacity and promise, and endeavor to help him to that type of self-education which will be most satisfy-

ing and beneficial. He will act as consultant in any relation in which the assistant needs help.

### 1. Organization of work

As has been previously said, the establishment of a *general routine for circulation work* to fit local conditions, staff, book collections, and public demands is the work of the head of the circulation department cooperating with the declared policies of the librarian. Outlines of directions for general routine at the circulation desk, sometimes called staff instructions, or direction sheets, should be preserved in permanent form for staff study and guidance. These should incorporate the changes that creep into any system. Conflicting alterations and adaptations are often avoided if all the details of the department procedures are thus recorded. In many large libraries the direction sheets take the form of a code book containing a detailed and complete compilation of all rules for the public as well as the staff.

In arranging the work for the department much thought will be given to desk routines and the distribution of duties, and the preparation of schedules. These topics have been outlined in full detail in Chapter 10. Similarly the question of statistics and reports has been dealt with in Chapter 11. The entire staff is vitally concerned with all these matters but as an administrator the department head finds here at once his heaviest responsibility and greatest opportunity.

In the general organization of work, the department head will find it essential to plan a *program of administrative duties*, those things which he does regularly, or over which he maintains a regular personal supervision. The correspondence of the department usually comes to his desk for answering. The search for material may call for his personal attention or may be delegated to an assistant. Questionnaires concerned with circulation work often involve much search and consideration of records, techniques, or activities. The information thus collected is often

turned over to the librarian, who holds it for future use in meeting other queries. In every busy department there are day by day many calls that fall into no routine of planned work. These requests naturally reach the department head, who provides for them, often through assigning the work involved to capable assistants.

In some systems the necessary arrangements for *inter-library loans* may be supervised by the circulation department head. His duties will also include the granting of special privileges, as discussed in Chapter 5.

A certain amount of time may profitably be spent by the head of department at intervals in the *performance of routine duties*. This enables him to appraise these duties from two points of view, that of the assistant and that of the administrator. He may, therefore, be better able to measure the assistant's performance of duties, to see where motions are lost and where the service can be improved. The administrator knows the educative possibilities of all routine, knows when interest ceases and drudgery begins, when rotation is imperative if the assistant is to keep an open and receptive mind. He knows the challenge to be found in new work and all that is required and offered in the learning of detail for new tasks. He knows the advantage of the criticism of routine contributed by a thinking assistant undertaking a new piece of work, and further the value of such criticism when the same assistant has become thoroughly familiar with its details. Any discussion of methods or procedure which will create constructive questions in the mind of the assistant is to be encouraged. Only as the center and directing force of a live organization equipped to consider and weigh all the practices and performances of the circulation desk will the department head know when to stop doing old things in the old way if a new way is better.

The head of an active circulation department, as of any other department, needs a wider touch with developments in his work than is possible in the mere performance of the day's duties.

Though abreast of professional reading, still further broadening opportunities are needed which can be found through attendance at state and other library meetings. Visits to other libraries are often the occasion of provocative comparisons of methods and of conferences with librarians struggling to meet similar problems and difficulties.

## 2. Organization of staff

The head of the circulation department who is interested in the study of people will find an excellent opportunity for observation in the staff of the department. Something of the relation with these assistants has been touched upon throughout this book, and too much emphasis cannot be given this topic. The library owes to every staff member work that will develop both mind and character. The administrator's real chance to fit into this broad scheme comes in the distribution of duties which follows a careful analysis of each assistant from all angles.

The staff of the circulation department meets many problems different from those presented to the other departments of the library, and needs especially an ability to do good team work. Cohesion and singleness of purpose must knit this group together. The power of organization depends on mutual respect and loyalty to the same ideals on the part of all the individuals involved. An instinct for leadership is essential in the department head if a creative attitude toward the work is to be maintained on the part of the staff.

The organization of the work for this staff has been outlined. Its personal relations, both within the group and between the department head and the assistant, remain to be considered. The effectiveness of the service may depend largely on these relations, for through this staff the plan of organization must be translated into service.

The regular hours of service will serve as a basis for the departmental schedule. Sick leave is granted for a varying number

of days during the year, which may or may not cumulate, according to local practice. A leave of absence for purposes of study, travel, or other good cause is usually granted by special arrangement. Summer vacations are a universal rule, and the assistant's preference for time is considered when possible. Each library makes its own regulations concerning time lost by the assistant through tardiness or other causes, and with regard to overtime work which may be required in emergencies. In most libraries time is granted for attendance at professional meetings or conferences, including travel time if the meeting is at a distance.

The question of *punctuality* assumes great importance in circulation routine since service to the public requires that an assistant stay at a desk until relieved by the person scheduled to succeed him. With a view to encouraging punctuality some libraries require that all tardiness be reported to the department head with full information as to the time lost and the reason for the dereliction. These reports, together with reports of absence because of illness or other reasons, are usually assembled at intervals and in some libraries are deducted from such overtime as is due the assistant. Minute records of attendance are kept in other libraries on time sheets, or by means of time clocks.

The smoothness of the routine procedure depends on the spirit in which all those concerned in its details meet the regulations. The morale of the circulation department is tremendously important and may be easily felt by the borrower who comes into contact with the assistant in the regular performance of duties. Hence, dissatisfaction or internal disturbances of any kind must not be allowed to smolder. If the department head is an approachable person, keenly anxious to maintain a unified service and to encourage initiative, he will obtain and welcome impersonal constructive criticism, whether it originates with the staff or is gleaned from comments of readers.

### 3. Instruction to staff members

There is much direct as well as indirect instruction given by the circulation department head as he moves from post to post and duty to duty. The actual work of teaching is greatly reduced if direction sheets with full details of all routine procedures are available. If these are not printed in quantity, typewritten sheets containing the information may be kept on file at the circulation desk. Necessary notices of variations or alterations in routine or schedule involving unusual happenings must often be circulated to each member of the department. These notices, carefully phrased, should include a list of names or assistants' symbols to be check-marked as read by the staff member. When returned to the department head, they are posted on staff bulletin boards and are later filed.

Much of the teaching done by the department head in many libraries is in connection with the training class. This class is organized to provide instruction in procedures used in the local system for the benefit of untrained workers who will be employed as assistants after the successful completion of the course. It may be so planned that department heads provide only incidental lectures, supplementing the drill in routine procedure given by the director of the class. In other systems each department head gives instruction in the work of his own department. Practice work is usually required and a careful supervision is maintained, often by assigning one or more assistants to work in turn beside the student, to give instruction when necessary and to report on the performance of the duties. An assistant assigned to do this may thus be made to feel a share of responsibility for training the still younger staff member. A personal supervision of each student will be maintained by the department head so that he may be qualified to judge the student's fitness for the work.

Indirectly the department head may accomplish by the force of personal influence much that is not possible through direct instruction. He may cultivate an unhurried, even way of going from one



thing to another, settling controversial questions with a sense of fairness to all concerned, meeting emergencies or the regular demands of the public effectively and in a way to inspire confidence in his ability on the part of both the staff and the public. Each assistant will realize that the department head who is a successful administrator possesses the same qualities as the successful assistant but with an added ability to see the department as a whole, to direct and inspire the people with whom he works, and to draw from them the best service that they can give, not only for the benefit of readers but for the personal satisfactions to be found in doing one's work well.

#### 4. Staff meetings

Staff meetings may be general or departmental, depending upon the size of the library and its organization. In smaller libraries where only *general* meetings are required, the heads of departments may help in planning the programs. In many systems staff meetings for a season are outlined to present problems of general interest or a series of special topics. Perhaps a local club paper, which has been seen to a successful conclusion through the efforts of the public departments of the library, may be read by the author for the benefit of the staff. In such instances the head of the circulation department and the assistants as well, knowing something of papers being prepared in the library, may offer practical suggestions for interesting programs which will give a point of library contact helpful alike to the reader and the library.

In larger libraries, *departmental* staff meetings offer many opportunities to the circulation staff. Specific programs may be planned, and books assigned for reading, review, and for discussion. Problems encountered in the course of work may be presented and occasionally may be distributed to small committees authorized to investigate questions and to bring in a report of findings for later discussion and action. These meetings may be scheduled regularly, as is often the case when programs are de-

voted to book reviews, or they may be called at irregular intervals for the consideration of incidental topics. Heads of other departments often contribute information concerning their own work which is of interest and significance to those engaged in circulation work.

Attendance at staff meetings is usually required, and if they are held in hours when the library is open, a rotation of assistants is arranged so that the desks may be manned by a different group during each meeting.

Staff meetings are most effective if conducted informally, with as little restriction on comments as is necessary to keep discussion to the matter at hand. A closer knitting of interests can often be secured in departmental meetings, in which the department head can lay before the staff for open discussion not only routine problems but also those administrative difficulties requiring the united attack of all concerned.

### III. DEPARTMENT HEAD AS AN INDIVIDUAL

With these responsibilities to the library, to the assistant, and to the reader, what may the head of the circulation department be said to owe himself if he is to justify his existence, and to find the zest as well as the actuating motives behind the hard work which will be his?

First of all must come a keen, full realization of the varied opportunities that are his. Through staff contacts he may help to teach and train a corps of vigorous, thoughtful librarians, equipped for better service because they know that work must be done in the best possible way rather than in keeping with mere convention or tradition. Through personal service to readers, books and people are brought together, and men and women can find more easily those books which satisfy their needs. Here lies creative opportunity and great power, which call into play all one's endowments, training, and experience.

In the multiplicity of demands made upon him and in the

diversity of his duties, lies the basis of the belief that ends must be seen distinct from means; that emphasis must be placed on the intellectual phases of circulation work. Through this view of his work the head of department may help to make the library a dynamic, constructive force for education in the community.

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## THOUGHT QUESTIONS

1. Outline a plan for checking and storing supplies at a circulation desk in a medium-sized library.
2. In a system which arranges for the regular exchange of assistants between departments, what may the circulation assistant gain through being sent to:
  - (a) the catalog department,
  - (b) the order department,
  - (c) the reference department.To which department would you prefer to be assigned? Why?

3. Give two illustrations of cooperation between a circulation department and each of the following departments:
  - (a) order,
  - (b) reference,
  - (c) catalog,
  - (d) administration (librarian).
4. Assume that a medium-sized library is about to establish an organized circulation department and that the librarian who previously assumed all administrative work connected with circulation is delegating some of these responsibilities to a department head. Suggest in the form of parallel lists those duties which might be delegated, (a) wholly, (b) in part, and (c) not at all.
5. Outline a method of cooperation in book selection for the circulation department of the library in Question 4. Carry the plan suggested to the point where the assistants themselves are involved.
6. As a new assistant in the circulation department, what specific guidance and direction would you expect from the department head?
7. Of the following problems which would you, as an assistant, decide for yourself and which refer to the department head? Why?
  - (a) A prominent lawyer wishes to draw eight related works on a special subject for six weeks.
  - (b) A teacher wishes to take eight books on United States history on her teacher's card.
  - (c) An assistant is asked by a friend to review two new books at a woman's club meeting.
8. Discuss the statement that the head of the circulation department "stands as an intermediary between the librarian and the staff, and often between the librarian and the public." Cite ways in which this administrator may be an intermediary, and explain desirable relationships.
9. What are the advantages of delegating some definite responsibility to every assistant in the circulation department?
10. Suppose that a general assistant has convinced his superiors:
  - (a) that a registered letter used as a second overdue notice will minimize follow-up work, and

(b) that arranging reserve books by the names of borrowers is more convenient than an arrangement by date.

Trace from the beginning the probable steps through which each suggestion passed from inception, through experimentation to final adoption, taking account of the relative importance of the two suggestions.

11. What errors are likely to be made by a head of circulation work who holds aloof from performing any routine duties?
12. What seem to you to be the four or five major problems of the administrator? Give reasons for your statement.
13. Outline a possible program for a departmental (circulation) staff meeting, including both items of interest and transactions of importance. Suggest a possible disposition of the questions raised.
14. Make a direction sheet for one of the following processes:
  - (a) Registering a non-resident borrower,
  - (b) Charging a book in a public library,
  - (c) Charging a book in a school library,
  - (d) Discharging a book.

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# CHAPTER 13

## The Personality of the Circulation Librarian

By W. W. CHARTERS

- |  |                                     |
|--|-------------------------------------|
| I. LIST OF PERSONALITY TRAITS<br>OF CIRCULATION LIBRARIANS | IV. COMPILING THE LIST OF<br>TRAITS |
| II. DEFINITION OF TERMS                                    | 1. A typical interview              |
| III. THE IMPORTANCE OF PER-<br>SONALITY                    | 2. Telescoping and allocation       |
|  | 3. Revision                         |
|  | V. EVALUATING THE TRAITS            |
|  | VI. DEVELOPING THE TRAITS           |
- 

For students who are preparing to assist in the circulation of books in a library, no course of instruction is complete until the personal qualities necessary for this phase of the work have been treated with the emphasis that their importance demands.

To make our discussion of the subject both concrete and practical we shall present immediately a list of qualities, or traits, which has been secured by methods to be described at a later point in the chapter. At this time it will be sufficient to read the list carefully, trait by trait, and to note particularly those actions which are listed under each, to describe just what we mean by each trait. Such a procedure on the student's part will make much easier the reading of the subsequent pages.

### I. LIST OF PERSONALITY TRAITS OF CIRCULATION LIBRARIANS

(Described in terms of trait actions)

- I. Accuracy
  - a. File book cards correctly

- b. Charge books correctly; copy registration numbers correctly
  - c. Send overdue notices to the right people, getting addresses correct
  - d. Slip books correctly
  - e. Give instructions definitely and simply
2. Adaptability
- a. Work happily with others under trying conditions
  - b. Turn from one task to another willingly and quickly
  - c. Cooperate: take instruction and suggestions kindly; work for another when necessary
  - d. Enjoy serving every class of people
3. Courtesy
- a. Respect every request from readers
  - b. Show unfailing courtesy under all circumstances
  - c. Listen to people in a polite way
  - d. Give information politely over the telephone
4. Dependability
- a. Be punctual in relieving at the desk
  - b. Perform given duties conscientiously
  - c. Feel responsible for getting what the borrower wants if possible
5. Forcefulness
- a. Be able to speak effectively in conference
  - b. Maintain quiet and order in the library
  - c. Impress the borrowers with your ability in the work
  - d. Be sensitive to maintain the rights of the library when borrowers abuse them
6. Health
- a. Stand on your feet without tiring
  - b. Do not get excited in emergencies
  - c. Hear distinctly
  - d. Strive to keep physically fit and look fit

7. Imagination
  - a. Show discerning ability to sense the exact book or information wanted
  - b. Read meaning into obscure requests; comprehend the unspoken need
  - c. Suggest books to the borrower who does not know what he wants
  - d. Select books for the borrower who is not present
8. Industriousness
  - a. Perform pick-up work in slack times
  - b. Do not waste time
  - c. Do not visit with other workers or with borrowers
  - d. Do not seek always the easy hours of the schedule
9. Initiative
  - a. Be alert to assume responsibility; desire a better position than the one you hold
  - b. Take on duties which may or may not be yours, but which you obviously should perform at the time
  - c. Report little things that might lead to trouble
  - d. Watch for short cuts; devise new ways of doing things
  - e. Voluntarily visit other libraries for new ideas
10. Intelligence
  - a. Substitute material if you do not have exactly what is wanted.
  - b. Understand orders and interpret rules
  - c. See all sides of a question
  - d. Recognize your own limitations: Know when you should call on your superior
  - e. Interpret the library to the borrower
11. Interest in people
  - a. Skilfully lead borrowers to read better books
  - b. Show genuine desire to help people
  - c. Like to meet people and to serve them



- d. Show sympathetic interest in meeting the requests of all classes of borrowers
- 12. Interest in work
  - a. Show unwearied devotion to your work
  - b. Believe that library is important to the culture of the community
  - c. Show enthusiasm for your work
  - d. Make your own job increasingly important by the way you fill it
- 13. Judgment
  - a. Show discrimination in selecting books for borrowers
  - b. Make reasonable exceptions to rules within the limitations of your own responsibility
  - c. Show discretion in dealing with borrowers; serve the opposite sex impersonally
  - d. Know when to help borrowers and when not
- 14. Memory
  - a. Remember borrowers and their wants
  - b. Recognize people and know them by name; remember their reading tastes
  - c. Remember books and be able to recall them quickly
  - d. Remember rules and previous interpretations
- 15. Mental curiosity
  - a. Be alive to increase your knowledge of a subject
  - b. Wonder why people want certain things
  - c. Visualize in advance the reactions of an individual borrower when you select books
  - d. Inquire into the reactions of borrowers to books as a guide to other contacts
- 16. Neatness
  - a. Keep yourself neat, dress neatly
  - b. Make things at the desk look neat and inviting
  - c. Keep files neat and clean
  - d. Arrange books attractively on the shelves

## 17. Patience

- a. Do not show irritability when tired nor flare up when things go wrong
- b. Take time with annoying individuals
- c. Serve people as willingly at five o'clock as at nine
- d. Perform routine duties without irritation

## 18. Pleasantness

- a. Meet people pleasantly under all circumstances
- b. Keep cheerful when you are taken from your favorite task to another
- c. Cultivate a low, pleasing voice
- d. Appreciate amusing and diverting things

## 19. Poise

- a. Meet querulous or annoying borrowers easily
- b. Have perfect control of temper at all times
- c. Put borrowers at ease
- d. Keep cool in emergencies

## 20. Professional knowledge

- a. Know the library as a whole
- b. Have good educational background
- c. Cultivate wide knowledge of books and authors; be well informed
- d. Develop discriminating taste for literature
- e. Know and appreciate professional tools so that you can use them intelligently

## 21. Speed

- a. Supply material and information quickly
- b. Charge books quickly
- c. Slip books rapidly

## 22. System

- a. Keep desk and supplies in good order
- b. Do your work in a systematic way
- c. Have a place for everything and put things back in place
- d. Plan routine duties for more leisure hours

## 23. Tact

- a. Ask questions skilfully when the borrower does not clearly express his wants
- b. Adjust difficulties easily
- c. Gracefully refuse to chat with borrowers
- d. Meet unpleasant situations so that people leave as friends

## II. DEFINITION OF TERMS

It will facilitate matters if we define the terms trait, quality, ideal, trait action, personality, and character. The following definitions express the meanings of the words.

A *trait* of character or personality is defined as a type reaction. For example, an honest man (one who possesses the trait of honesty) will react to any situation in a typical way. We know in general what he will do since we know in general what an honest man would do in such a situation. Similarly, a courteous woman will react to a situation in a manner true to type.

The word *quality*, as applied to character and personality, is a synonym for trait. We speak interchangeably of the qualities of librarians and the traits of librarians.

A trait (or quality) becomes an *ideal* when it becomes an object of desire. One may be aware of the trait of tactfulness but it becomes an ideal only when one wants to possess it or wants to possess it in a greater degree. Not everyone makes ideals of all good traits because not everyone strives to possess all good traits.

*Trait actions* are actions through which the trait is expressed. To display the trait of accuracy we may file book cards correctly rather than incorrectly; send overdue notices to the right people rather than to those who do not have overdue books; give definitions exactly and simply rather than hazily and abstractly, and so forth.

*Personality* is a term applied to the individuality which makes one the person he is. When we analyze a personality, we do so in terms of traits. Upon examination of a person, we discover that he

has much or little of the trait of friendliness, more or less forcefulness, or such and such an amount of imagination. The term is sometimes loosely used as in the statement, "She has no personality." This is incorrect if our definition holds, because every person possesses a personality. The statement would more accurately describe what is probably meant if it were changed to read, "She has no social personality," or it might be still more accurate to say, "She has no tact, forcefulness, and initiative."

*Character* is a term applied to the more fundamental traits of personality. To me industriousness may be a trait of character, while speed and accuracy are not. What the fundamental traits are, is a matter of opinion. We cannot measure accurately their relative importance, consequently you may not agree with the opinion I have just expressed. If you do not, we can settle the difficulty only by appealing to people in general as their opinions are expressed in the literature dealing with the subject. To avoid controversy on this point this chapter is entitled, "The Personality of the Circulation Librarian" rather than "The Character of the Circulation Librarian." It does not matter whether or not the traits we discuss are traits of character; they are traits of personality, and as such are all of importance to librarians engaged in circulation work.

### III. THE IMPORTANCE OF PERSONALITY

To answer the question, Why is a good personality of importance to the circulation librarian? it is desirable to ask a series of subordinate questions: What is the difference between filing book cards, and filing book cards accurately; between giving information over the telephone, and giving information politely over the telephone; between speaking in conference, and speaking effectively in conference; between slipping books, and slipping books quickly; and lastly, between refusing to chat with borrowers, and gracefully refusing to chat with borrowers?

These questions may be answered immediately. The difference

is in the difference between work merely done and work well done. If we possess the trait of accuracy, we shall file book cards correctly. If we do not possess this trait, we shall file them in the wrong place with consequent loss of time and happiness. If we possess the trait of courtesy, we shall give information politely over the telephone and make a friend. If we do not possess the trait, we may make an enemy for the library. If we possess the trait of forcefulness, we shall speak effectively in conference and thereby help ourselves and others. If we are not forceful, we shall merely speak, or we may be afraid to speak at all, and in neither case will anyone be helped. In short, if we possess the traits in our list in high degree, we become expert workers, and by our expertness we advance the cause we love. If we do not possess these traits, we are inefficient to the degree in which we lack them. Traits thus become the standards of performance of our duties.

Because the possession of these traits is of importance to the task, it becomes of importance to us as individuals. To excel in something is a universal hunger. Every one of us wishes to be proficient in something. We get our deepest satisfaction out of being an artist in some one line. For the professional man or woman genuinely interested in his vocation, the line in which artistry is most satisfying is his profession. Therefore, to secure deep and thrilling professional satisfaction, possession of the traits of the vocation is a necessity.

#### IV. COMPILING THE LIST OF TRAITS

In collecting the list of traits for circulation librarians we followed a procedure that has frequently been used in other vocations. We first compiled a list of questions to be put to librarians in the field. The following are samples of these questions: (1) If you were employing a circulation assistant, what qualities would you look for? (2) Think of the best circulation librarian you have ever known. Why was he so good? (3) Think of one of the worst assistants you have ever known. What were his failings?

A complete list of the questions asked appears in the typical interview below. In the case of each trait named in answer to a question, a supplementary question was asked: What did he do to show this quality? This latter question was necessary so that we might know what the interviewer meant by the qualities he named. It will be noticed by those who study the questions carefully that they are deliberately constructed to overlap so as to ask the same question from several points of view.

The staff then interviewed in person twenty-five widely separated librarians and heads of circulation departments and recorded their answers to these questions. This number of interviews was sufficient, as we have found in other studies, because the traits are determined by the job rather than by personal opinion, and the circulation of books is essentially the same job in every locality—or at least, it requires essentially the same traits. In this case, we secured twenty-three traits in the first seven interviews. The last eighteen persons interviewed added no new traits. After the material from the interviews was assembled, the returns were analyzed by the staff under the direction of Emily H. Kenagy, who was employed for this purpose because of her varied experience in making trait studies.

### 1. A typical interview

The reader may be interested in the material secured from a typical interview with one librarian. It was recorded in the following form:

1. When you are employing a circulation assistant, what particular qualities do you look for?
  - a. Pleasing personality; she should be free and easy to meet.
  - b. Good manners.
  - c. Perfect control of temper no matter what may occur. The patron always feels that he is right and the circulation assistant must not antagonize him.

- d. A knowledge of books; be able to suggest books to the reader if his particular request cannot be filled.
  - e. Imagination; she must project her imagination in order to see the needs of the patron who does not know what he wants.
  - f. General knowledge of library methods. She needs to know about cataloging, order work, book selection, shelving, etc., in order to handle the desk work intelligently.
  - g. Ability to learn to know people quickly; people like to be recognized and to have their needs and their interests known.
  - h. Lack of snobbishness. Apparently she must be as interested in the poorest as in the richest person in town.
  - i. She must be fair and give all patrons the same treatment.
  - j. She should understand children and be attractive to children; that is, she must like children and respect even the smallest child and show this attitude.
  - k. She should show the attitude of the hostess; she should not be too effusive to all who come to the desk.
  - l. Particularly in the small library she must be a good salesman of books; that is, she must know books and be able to learn quickly how to get the right book for the right person.
  - m. She should be alert, particularly to what is going on in the community. She might even make a special community study.
2. What are the educational requirements?

In practice, she should be educated well enough to make a good impression; should use good grammar and have the general appearance of an educated person. She probably does not need so wide an education as a cataloger. The ideal would be to require one year's training in a library school, but in small libraries this is impossible because of lack of money for salaries.

3. What qualities do you think distinguish a circulation librarian from a clerical worker in the circulation department?

The circulation librarian must have initiative. Problems must be met quickly, for example, discussion with patrons over books and fines. She needs executive ability, since circulation work often piles up and needs to be managed well. She must know books better than the clerical assistant and possibly needs greater ability to get along with people.

4. Think of the best circulation assistant you ever knew. What characteristics appealed to you? Why did she come to your mind first?

a. She had infinite patience. She never allowed people to irritate her.

b. She had perfect control of her temper.

c. She liked people, both adults and children, and was quick to learn their interests.

d. She loved books and liked to suggest books.

e. She was an able executive; she managed her own work well, and was efficient in handling the assistants under her.

f. She was accurate; she kept track of books accurately; copied registration numbers accurately and in this way avoided friction with the public; that is, she avoided controversies as to whether a borrower had a book which he claimed he did not have.

g. She was neat; her neat desk gave a good impression of the library to the patrons. The desk is the first place to which a patron goes in the library.

5. What things have circulation assistants done that pleased you very much? (Give examples of the sort of things that circulation assistants do which please you very much.)

a. Being nice to patrons, that is, being polite and willing to give them special attention.

b. Showing accuracy and interest in work; making effort to broaden her knowledge of books.



- c. Developed executive ability; did not allow work to pile up.
  - d. Was alert, knowing things of interest to people, or happenings in the community.
  - e. Told the head librarian what had been asked for and not supplied, that is, watched closely the requests received and the resources of the library.
6. What traits irritate you? (What are some things which circulation assistants do that you find irritating?)
- a. Getting into difficulties with the patron; applying rules too strictly.
  - b. Inaccuracy, particularly in filing.
  - c. Poor executive ability; inability to plan work well.
  - d. Lack of interest in patrons and their requests.
  - e. Lack of cooperation with the library staff.
  - f. Lack of loyalty to the librarian.
  - g. Talking too much; gossiping over the desk. The circulation assistant must be clever in refusing to talk with patrons and must avoid allowing them to take up her own time.
7. Describe the worst circulation librarian you ever had.
- a. She fought with the public.
  - b. She had a loud, unpleasant voice which could be heard all over the library.
  - c. She was inaccurate; we never knew whether the person charged with the book had it or not.
  - d. She thought the public was a nuisance, and had no interest in readers.
8. In what ways would you improve your best circulation assistant?
- a. She needs to read more widely; if one does not know books, one cannot "sell" them.
  - b. Greater neatness; she should keep the desk more attractive.

9. Have you ever discharged a circulation assistant? Why? (Do you recall a case?)  
No.
10. How has one of your present good circulation assistants grown or developed since you employed her?

The person in mind developed greater interest in all phases of library work and finally went to library school. She is now an instructor in a library school. Circulation offers the most pleasant work in the library since it deals directly with books and people.

## 2. Telescoping and allocation

Upon the basis of past experience with trait lists we decided at the outset that we should keep the number of traits at approximately twenty. For teaching purposes more are confusing, and fewer lead toward too great generality. It is possible to limit a list to any specific number without making omissions if we telescope the traits, that is, combine two or more and represent each member of the combination by trait actions listed under the one selected to represent the combination.

An examination of the reports shows that the traits are sometimes expressed as nouns, e. g., accuracy, adaptability, etc.; and sometimes as trait actions which explain what the person does. In such cases we use the process of allocation. For instance, the following items taken from interviews were all allocated to the class called "adaptability."

Work happily with others under trying conditions

Turn from one task to another willingly and quickly

Cooperate; take instructions and suggestions quickly; work for another voluntarily

Enjoy serving every class of people

Adaptable to the particular job in the department; fit self to the work

Get on with others; meet emergencies

Make up lists under adverse circumstances

Work well with other workers; willing to turn from one task  
to another in emergency  
Congenial with other workers  
Able to get on with fellow workers  
Cool-headed in emergency  
Could serve any class of people  
Able to work with others and change work quickly  
Adaptable  
Able to work with others  
Able to get along with people  
Able to work with people under trying conditions; not "bossy"  
Work well with others

### 3. Revision

When the material had been allocated and telescoped, the staff made four revisions of the original list. This was necessary for two reasons. In the first place, the staff could assist in clothing the traits in the terminology most familiar to the craft. Other things being equal, it is preferable to call a trait by the name the profession ordinarily uses in describing it. In the second place, the staff was able to help select from the trait actions illustrating each trait, the four or five which would be most significant to librarians.

When these steps had been taken, the list was in the form presented above. Others might call the traits by different names; but we describe by the use of trait actions what we mean by the trait. Still others might wish to add traits. We, however, have included the others that might be mentioned under those which we present in our list; or at least, we have included in our list all that were mentioned by twenty-five interviewees, and the probability of finding still other common ones is small.

## V. EVALUATING THE TRAITS

When the list had been compiled we were interested in discovering which were thought to be most important among the twenty-

three. It was, therefore, submitted to thirty representative librarians attending the summer institute at the University of Chicago, and to seventy-nine patrons of libraries, to secure an evaluation by each group. The ranking was secured by asking the librarians and the patrons to divide the traits into three groups—those that were most essential for circulation librarians, those that were least essential, and those that lay between these two groups. The traits were ranked according to the number of times each was considered to belong to the most essential group, by the librarians on the one hand, and by the patrons on the other. From other studies made in the past it is apparent that this method of determining relative importance is adequate. Our experience warrants us in stating also that the judgment of any group of librarians or patrons would not vary greatly from the judgment of these two groups.

In the ratings which follow immediately in tabular form, no significant differences are apparent. It will be noted that accuracy was ranked with tact, by librarians, as being most important, while accuracy was given second place and tact fifth place, by patrons. The two outstanding cases of differences are those of "Professional knowledge" and "Health." The patrons rate "Professional knowledge" very high, probably because they are conscious of the fact that they want excellent service. The librarians rate it lower probably because they are inclined to take it for granted. The patrons have less regard for health than the librarians because they see less of the influence of the ill health of the workers upon the efficiency of the library than do those who are engaged in library work.

It is of interest to notice that the six traits ranked highest by the two groups are the same with the exception of "Professional knowledge" and "Interest in people," and the latter was rated by the patrons as being seventh. It is apparent, therefore, that in the opinion of both groups social qualities are the outstanding traits, along with "Accuracy," in the qualifications for this position.

In the list which follows, when two or more traits received

the same number of first choices each received the same ranking number, and the next consecutive number or numbers in the ranking were skipped. This brought the last ranking number to twenty-three, the total number of traits.

### IMPORTANCE RANKING OF TRAITS OF CIRCULATION LIBRARIANS BY LIBRARIANS AND PATRONS

TRAITS	LIBRARIANS	PATRONS
Accuracy .....	1	2
Tact .....	1	5
Courtesy .....	3	1
Interest in people .....	3	7
Intelligence ... ..	5	4
Patience .....	6	5
Health .....	7	16
Pleasantness .....	8	9
Judgment .....	9	10
Poise .....	10	17
Dependability .....	10	8
Adaptability .. .	12	14
Imagination .....	13	15
Neatness .....	14	18
Memory .....	15	11
Initiative .....	16	21
Professional knowledge .....	16	3
Speed .....	16	12
System .....	16	12
Interest in work .....	20	19
Mental curiosity .....	21	23
Industriousness .....	22	20
Forcefulness .....	23	22

### VI. DEVELOPING THE TRAITS

The important consideration for students is the development of weak traits. This can be done in two ways—directly and indirectly.

Traits are developed indirectly by performing each duty with the appropriate trait in mind. If you wish to develop the traits of a circulation librarian in your own personality by the indirect method, you should decide in connection with each duty what traits you must use to perform the task properly. When you file book cards, do it accurately and speedily because accuracy and speed apply to that duty; when you listen to people, be polite because courtesy is the trait which applies to that duty; and when you relieve at the desk, always be on time since dependability applies to that duty.

Some duties call for accuracy and speed, some for tact, others for dependability, and still others require the use of several traits. When you have completed the list of traits that apply to each selected duty you should try to keep them in mind and strive continuously and persistently to develop them whenever you perform the duty.

To assist in this application of traits to duties, the author of the text has constantly kept this point in mind, and has informally called attention to the traits that in her opinion were particularly important for the various classes of duties described. A careful re-reading of the text to note what traits she considers important will be quite worth while.

Traits may, however, be developed directly. If the direct method is used, the first step is to get a clear picture of the traits in which you are strong and also the ones in which you are weak. This can be done by rating yourself on each trait. If you are about average in comparison with your class, give yourself a rating of C; if above the average, A or B; and if below average, D or E. When you have done this carefully, frankly, and fairly, ask some frank person who knows you well to rate you. Then hold a conference, compare your ratings, and arrive at a revised rating. You will then see that you have some strong traits and some weak ones.

Four basic facts control the process of developing weak traits. First, a trait is developed by doing the things which a person who

is effective in that trait would do. If you are lacking in courtesy, think about what a courteous person would do in a specific situation and do it.

Second, a trait is developed through the performance of the simple, intimate tasks of the day. If you wish to develop accuracy, you should make a list of the duties that demand accuracy, and you should then perform them accurately. There is no short cut to the development of a trait. You must use it wherever it is needed and thereby gradually develop it.

Third, for each weak trait you should make a list of the things you should do in order to develop it. These tasks should be those things that a person who is efficient in the trait would do, and should consist of the simple, intimate tasks of the day. For instance, in developing the trait of initiative, the following items taken from our trait action list will make a good beginning:

- a. Be alert to assume responsibility. (Name some responsibilities that you might assume)
- b. Take on duties which may not be yours, but which you obviously should report at the time. (List a few)
- c. Report little things that might lead to trouble. (Collect several)
- d. Watch for short cuts. (What are some?)
- e. Devise new ways of doing things. (Mention a few)
- f. Voluntarily visit other libraries for new ideas.

To these others should be added.

Fourth, the best results are obtained by working upon only one or two weak traits at the outset, and by gradually adding to them. Particularly valuable is the guidance of some strong teacher who is interested in seeing you develop your personality. If such a teacher will help you, will receive your report, say fortnightly, will criticize, praise, and discipline you, your growth will be more rapid. A semester spent in getting yourself started upon the intensive development of your personality will be more fruitful than a similar amount of time spent upon any other one subject.

Attention should in conclusion be called to the fact that a trait may be weak because it is too strong. A person may be so neat as to be fussy, so forceful as to be domineering, and so patient as to be irritating. Traits are not good in themselves. They are valuable when they can be reasonably justified on the grounds of usefulness. In such cases the same rules hold. If one is meticulously neat and accurate he should discard refinements of procedure and do what an *intelligently* neat and accurate person would do.

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### THOUGHT QUESTIONS

1. In cooperation with other members of the class, re-read the chapters of the text and make a list of the traits emphasized in connection with the duties discussed in each chapter. (Sometimes the traits are expressed as abstract nouns, as, accuracy, courtesy, etc.; sometimes as adverbs, as, accurately, courteously, etc.; and sometimes they are expressed as trait actions.)
2. Rate yourself fairly and secure a rating from at least one frank acquaintance who knows you rather intimately. Confer and revise the rating.
3. To see what impression one makes on other people who do not know one intimately, it is interesting to have each person in a class anonymously rate everyone in the class, including himself, and compile the results to see what the general impression is. In making this sort of rating, a sixth symbol, in addition to A, B, C, D, and E, is necessary for cases where the judge has no opinion about a trait. Such a symbol might be a dash (—).



4. Make a rather long list of the things you can do to develop each of the traits on which you wish to work.
5. If you can get a teacher to help you, have him rate you. Then confer with him in order to arrive at a composite rating. Ask him to make assignments for you and to have you report fortnightly in writing, telling how well you have succeeded and where you have failed. The first conference will take about an hour, the fortnightly conferences about twenty minutes. As indicated above, this will be a profitable exercise for a semester. At the end of that time you will know rather well how to proceed.
6. If a teacher is not available, set yourself some work for each week and follow your plan systematically.

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## CHAPTER 14

### The Assistant and His Reading

- |   |                          |
|---|--------------------------|
| I. BACKGROUND                           | III. READING FOR HIMSELF |
| II. READING FOR OTHERS                  | 1. Purposeful reading    |
| 1. Library periodicals and publications | 2. Casual reading        |
| 2. Book reviews: use and abuse          |                          |
| 3. Book conferences                     |                          |
| 4. Aid in selecting books for readers   |                          |
- 

#### I. BACKGROUND

The attitude of scholars and laymen to books has been the subject of many essays. In the fulness of their hearts men have written of books and their meaning in the lives of those who love them until there seems little left to say. Yet each generation, turning to the volumes beloved by its ancestors, or to those of contemporary authors, finds new angles, fresh suggestions and stimuli. Many of those who have written of the durable satisfactions to be found in the pursuit of knowledge *per se* have lived in generations when leisure was common to many men, though its possession conferred a distinction which attached to a definite class or group in any community. The leisure class claimed or accepted as a right the privilege of study for which all other men were forced to strive. They have striven to some purpose as economic conditions of life have changed for both men and women. Nearly all in this generation who feel the inclination toward books, who are open to suggestion as to their uses, can find time in which to read despite the fact that distractions and attractions have multiplied. In making books so easily accessible, libraries and schools stand as the important factors in the building

of good reading habits which should be started early in life and may be profitably carried forward with improving standards of taste. From the pursuit of reading grows imperceptibly that background which all men and women bring to the work they mean to do.

When the person choosing to be a librarian is by choice and by habit a reader, one who finds real enjoyment in books, with an interest genuine and deep, he starts with an impetus which should carry far. Whether or not he is thus endowed, the librarian needs to realize that out of the companionship of books, out of widely diversified reading, develop opportunities for indirect observation of current happenings and for a touch with the multiform activities of men in relation to each other. He will find also a means of enlarging his outlook on life by extending experience vicariously, and will learn that through a change of interest and thought the reader may find rest, diversion and recreation in its broad sense within the world of books. If the assistant has a wide, general knowledge derived from the intelligent use of books which forms the basis of all the special knowledge required of librarians, he may be trusted to find his own way. If he has learned to browse and knows something of authors and publishers, of literature, of history, of the development of movements which have influenced civilization, the ability develops rapidly to guide others to what he has found for himself. The librarian who comes into contact with the public must read. He cannot afford under any circumstances to read only what he ought to read. There must be further impetus than that behind the day's work. His liking for books should be personal as well as professional. The librarian should read as an individual with tastes, impulses and interests entirely separate from those developed and acquired in the effort to serve the public.

The staff member who has grown up in a home atmosphere of books, exposed to the lure of full shelves, brings to the library a point of view developed through years of easy access to books

which fits him peculiarly for his task. Everything that he has read, books which are apparently forgotten, facts which have been overlooked because they seemed unrelated to his previous life—all help to build a background and supply a knowledge not always easy to trace to its sources but nevertheless useful. The assistant whose reading has not been found in the home may have achieved a foundation through different channels. The public library, with its broader and more evenly balanced collection, may have supplied his book needs, and may have developed in him an ability to discriminate and a power to choose what meets a requirement or suits a mood. The results in either case may vary, greatly depending on the mind of the assistant, his approach to books, and what he brings to, and gets from, his reading.

Combined with this more or less informal and personal effort is the formal training which the librarian has gained in school. His reading may have been carefully supervised by teachers, librarians, or some interested older person. Or he may have been allowed to follow his own impulses within limits and to cultivate an individual taste through actual experience with books. There can be no best way to build a background of books. Too severe restrictions, too definite guidance can easily destroy the spontaneous pleasure which any person, allowed to follow a natural bent, may find in books. Many a boy and girl never loses the feeling of boredom resulting from being required to read as a task those books which if chosen freely might have been the source of real pleasure.

The library assistant with an acquisitive and inquisitive mind is constantly adding to his equipment not only by what he reads but also by what he sees. Every book handled and discovered to be interesting, magazines, newspapers, even the sign beside the road, supply facts which are unconsciously sifted, assorted and filed, so to speak, for use. On the other hand, no library assistant should endeavor to cram his mind with an encyclopedic accumulation of unrelated material and make of it a sort of mental scrap

bag in which he may grope upon occasion. He needs much more to be a person with an insatiable appetite for the printed word, a craving to reach the soul of books which no amount of use and handling of books as tools can ever destroy. Combined with this should be a special type of memory, associative and accurate, which will retain reasonably clear impressions of what is read and when allied with logical thought and an intelligent application of theories will enable the librarian to trace material suited to the readers.

## II. READING FOR OTHERS

The circulation assistant who realizes the deeper responsibilities of his position will find that two very definite sorts of reading must occupy his scant leisure. A sense of proportion will be required to divide fairly the reading done for others, or *professional reading*, and that done for himself, *avocational*, or creative reading. Professional reading furnishes an indispensable means of furthering effectiveness in work. Its purpose is to keep the student or assistant abreast of advances in thought and new movements in the book world, as well as to familiarize one with the work and the names of men and women active in advancing the profession of librarianship. From the literature dealing with librarianship may be developed a sense of fellowship with those who are making progress, and a wider interpretation may be acquired of the ideals behind the work than could be otherwise obtained. It is suggestive to one struggling to achieve and maintain high standards to feel that the indirect contact of professional reading brings him into touch with broadening movements in the profession.

### 1. Library periodicals and publications

The current professional reading done by librarians is largely confined to the journals and periodicals devoted exclusively to matters of interest to the profession. The general literature of

the profession has accumulated slowly, though certain phases of library work have been written about voluminously, and now the whole literature is expanding rapidly. Library periodicals are used as clearing houses for ideas, and their columns are open for discussion of all professional subjects. Papers prepared and read at meetings in all sections of the country are carefully assembled and published. The habit of reading these periodicals regularly is a valuable one, and to encourage it many libraries subscribe for copies for staff use. These are usually routed through the staff. Time is frequently allowed in library systems for the reading of these journals while the assistant is on duty.

One who consistently follows library publications and is familiar with the names of those who write for them often finds the interest of professional meetings and conferences heightened because of an acquaintance with the work of those who take part. In some systems, as a further means of directing interest to library publications, an important article, especially one bearing upon a debatable subject, is assigned to an assistant for a report at a staff meeting. If discussion can be aroused, the article will be read by more staff members with greater interest than would otherwise be the case.

In addition to the journals, many libraries and state library extension agencies or commissions issue bulletins of various types which have been described in Chapter 9. Much work is saved by the use of the timely, annotated lists issued in these bulletins. Some, if not all, of these publications are to be found in most libraries, whether large or small, and the staff member will find it very helpful to acquire the habit of inspecting them regularly.

## **2. Book reviews: use and abuse**

The stream of books issued constantly by publishers is so enormous that an intimate knowledge of any considerable part of them is quite impossible. A close acquaintance with the bulk of the collection of most libraries is an achievement almost equally hopeless. Hence it is necessary for the assistant to confine his knowl-

edge of most books to the second-hand opinions acquired through book reviews and through book discussion.

An intelligent use of book reviews presupposes a definite attitude on the part of the alert circulation librarian, whose sense of proportion will show where the use of a valuable tool merges into abuse, with results disastrous primarily to himself. In order to estimate the value of different literary reviews, the librarian will recognize at once that there are many definite types with distinctive characteristics. There are the more or less standard reviews with their unaltering policies, their traditions, and high literary qualities. Weekly journals of every sort include reviews of selected titles of books which seem of especial interest to their readers, or worthy of praise or condemnation, according to editorial policies. Periodicals published by learned societies and special groups usually include departments where more or less scholarly reviews of books of related interest appear. Professional periodicals as well as journals bearing on trade or industry can be relied on to supply adequate critical estimates of their special branches of literature. No librarian can follow all this mass of material, but he must learn to estimate the value and purpose of various periodical sources of reviews as well as the reviews themselves.

For the general reader there is the careful, honest, serious magazine often edited by a well-known person of literary standing and taste, which, in addition to its regular staff, draws on other writers for signed reviews of important books. Many such reviews are issued weekly as supplements to large and important newspapers in this country and abroad, and must be distinguished from the more casual newspaper reviews often inserted to fill space.

Advertising departments of publishing houses issue a highly enthusiastic type of book note in the endeavor to meet the commercial demand for special publicity which will appeal to the masses and encourage the sale of books. This is often printed on the colored jacket of a book and issued with review copies to

newspapers and periodicals, which, in exchange for a free copy of the volume, are willing to print the estimate supplied by the publisher. This description, commonly called "publisher's blurb," may be used by the staff if the invariably favorable description of the volume is accepted only at face value.

Another useful type of book note appears in annotated lists issued periodically for librarians. These notes attempt to describe the contents of a volume accurately without critical estimate. Tools of this nature have been described in Chapter 9.

The librarian who would find his way through this maze and still hold firmly the right to an honest, personal opinion based on careful reading needs a sense of balance in addition to an open mind and a discriminating taste. He should have no prejudices which may warp the sound literary judgment he is endeavoring to cultivate, nor an undue awe for the opinions of critics, with whom a healthy disagreement is often advantageous. Granting that he possesses a comprehensive interest in books in general and a strong intellectual curiosity as to their contents, still certain books and types of books will naturally appeal more than others. Critical reviews of these books may be provocative and may point the way to keener appreciation and discrimination.

In an effort to aid the circulation staff and to familiarize its members with books and the activities of authors and publishers, many libraries subscribe to special copies of carefully chosen reviews, which are routed just as professional periodicals are. Members of the staff whose duties include the recommendation of books for purchase often check these reviews as they appear, but for the assistant whose information about books must keep pace with public requests, they answer a different purpose. In many libraries the staff copies of reviews are kept on file at circulation desks, and during dull hours the assistant is permitted to read them. In such cases the assistant will be careful to avoid becoming so engrossed that the borrower hesitates to interrupt him. Reading at desks implies a divided attention, for the assistant should be alert to serve the approaching borrower and yet be able to absorb



the substance of what is read. In other systems reviews are kept in the staff room to be read by the staff when not on duty. Certain reviews may be assigned to definite members of the staff for inspection and report. In some libraries each assistant is scheduled for a definite period of time each week which must be devoted to professional reading. The wise person will accept the fact that all book reviews handled cannot be read thoroughly, and in choosing from the mass of this material those which he means to read regularly, the assistant may begin to exercise that right to follow the bent which is his as an individual. The reviews chosen should not be followed through habit, for the librarian must be constantly looking about for new ideas and, moreover, the worth of reviews is variable. He will, however, find those periodicals which, through the type of book reviewed and the manner of treatment, furnish the general information as well as the critical comment needed for his own guidance and enlightenment.

### 3. Book conferences

Numerous advantages accrue to the staff from book discussion, whether formal or informal. Staff meetings both general and departmental are scheduled in library time in many systems, and programs are carefully planned in an effort to distribute the advantages of book discussion among as many staff members as it is possible to reach. A genuine enthusiasm for the book read and reviewed may be most infectious. One good reader, possessing a certain skill in expressing estimates of books and their uses, can often stimulate those working about him to read for the sake of argument and the spirited exchange of opinions. If a similar impetus is carried to book conferences, these meetings can be used not only to spread a knowledge of books and authors but to cultivate a facility of expression on the part of each assistant which may be of great value in discussing books with borrowers. There are many other purposes and results from the book conferences arranged for the staff of any public library. But to the circula-

tion assistant they are primarily one more source of information to supplement his own reading.

#### **4. Aid in selecting books for readers**

All the reading which the circulation assistant does for others is primarily intended to fit him better to aid borrowers in the selection of books for their own purposes. Many by-products may derive from these efforts, but their primary purpose is to equip him to act in the capacity of consultant, aid, and guide to the collection of books. A capacity to evaluate books complements the ability to estimate the needs of borrowers, and through the combined use of these faculties the librarian is equipped to make a successful contact and to send the reader away satisfied and pleased.

To the assistant in the circulation department book selection means fitting books to readers, selecting those volumes which will meet specific and diversified needs. Numerous tools are supplied to assist in this work—lists and guides which have been previously described. But they are, after all, mechanical and the assistant who selects books for a borrower measures each volume by the individual's needs and mental equipment as he sees them.

### **III. READING FOR HIMSELF**

The circulation librarian, who has become expert in determining the desires of readers and in meeting their needs, should be equally capable of turning this skill to his own benefit. In spite of the heavy demands of professional reading, the right to spend at least some of his leisure in reading what he chooses must be kept intact. A diagnosis of one's own intellectual needs must be possible in order to find and preserve the joy in reading and the enduring enthusiasm for that which is beautiful and satisfying in books. In order to safeguard leisure, to avoid the waste of time, and yet to gain familiarity with much that he desires to read, the circulation assistant will soon begin to cultivate that

satisfactory yet most dangerous habit of *skimming*. Temperance in reading should be the librarian's keynote, his rule of life. In the mass of accessions in any library there will be many books that he wishes to investigate, and some that he wishes to read. The wise librarian will keep these two groups distinct. He will cultivate a capacity to sum up salient features of books by a rapid, more or less superficial survey of the title page, table of contents, index, and body of the book, by dipping in at intervals to discover the author's style, method of attacking his problem, and whatever else can be observed as the volume is thumbed through. Skill in skimming increases with practice, and therein lies the danger and temptation; for this superficial survey may easily spoil the pleasure to be found in reading, and may give rise almost imperceptibly to a loss of the habit of careful and thorough reading, with disastrous personal as well as professional consequences. The assistant will put a proper estimate on investigations made primarily to satisfy his curiosity and to enable him to form a cursory opinion, and will supplement them whenever possible by comments and reviews.

When the staff member ceases to be a librarian and becomes a reader, his problems may not differ greatly from those of the borrower who tries to find himself in the welter of books. Granting that he is following his own inclinations and not the continuous pressure created by the need to know something about the newest books, he will in all probability realize the importance of two sorts of reading. There is always the advantage to be found in (1) *purposeful or consecutive reading*; and the charm and mental refreshment to be derived from (2) the *casual reading* which results from browsing among books, old and new, reaching out for that volume which tempts for one or many reasons.

### 1. Purposeful reading

For the ambitious assistant, who is endeavoring to give a broader and more comprehensive guidance to readers, there is the

constantly increasing necessity for independent reading and thought, and for a firm grasp of fundamentals in many subjects. Though he must make a conscious effort to save time to think about his work and his reading, and to preserve the essential quality of his leisure, he should also strive to cultivate a capacity for consecutive study by allotting a certain proportion of time for that purpose. He may play the part of reader's adviser for himself and work out a list of books prepared to fill a gap found in his own background. It often takes determination and courage to plan and to follow such a course, after the busy hours of meeting similar needs for other people. However, because of a capacity to use books and a knowledge of what they will supply, the assistant with real tenacity frequently responds with remarkable rapidity and success to self-administered adult education.

In many library systems there is a recognition of the stimulus and incentive to be found in group study. The discussion which arises when several assistants concentrate on the same books or the same topic is provocative of interest and helps to maintain an enthusiasm which may naturally die under less favorable conditions. In some systems, staff reading courses are conducted for assistants who voluntarily enroll in them. These courses may be planned to extend through a winter or may cover the reading of several seasons. The assistant may thus be led logically through a more or less definite course of instruction and be encouraged to cultivate helpful habits of study and concentration. The reading course may be supplemented by informal lectures, and meetings for book reviews and other related discussion. Whatever the plan followed, the mere fact that there is a plan, that the assistant holds himself to certain standards and prepares himself to take part in discussion, suggests possibilities of growth and development for those participating in the activity.

## **2. Casual reading**

The always busy assistant who, in spite of the rush of work, can preserve a sense of freedom in his choice of reading, the

privilege of following his own taste and of yielding to the temptation of books, will have achieved something well worth the effort. For one living in an atmosphere where the new book—whether it be novel, or play, or volume of psychology—is constantly the recurring subject of conversation, where his opinion of the volume of current interest is frequently sought, it is not always easy to remember that a library is something more than a collection of new books. The relative importance of modern literature in any library must be admitted, but the thought that the institution is built for all time and not to meet transitory appeals must never be lost. In order to keep clearly in mind a sense of literary values, the assistant may wisely read or re-read occasionally some of the fine old books that never lose their flavor. When judging the book of the moment, one's opinion of its literary and artistic worth, its lasting qualities, is much less likely to be swayed by current critical estimates if the standards of comparison are one's own and firmly based on a wide acquaintance with books other than those of this generation.

The staff member in a library frequently finds no leisure and small opportunity to use its privileges while on the premises; it is impossible to transform himself from assistant to reader, with the indisputable right, possessed by any other borrower, to be undisturbed. Hence his browsing would hardly be recognized as such by leisurely readers, but he learns to do it, nevertheless, and his appreciation of his opportunities is increased by their very scarcity. A pleasantly definite type of person may even find time in odd minutes to develop a hobby or to become engrossed in some particular group of books in the library. He may watch for and read the new volumes added to this collection, and because of increasing knowledge may help to build the section of the library in which he finds particular interest. The developing ability to use those books which he knows thoroughly, with readers whose tastes coincide with his own, affords much satisfaction to the librarian and, incidentally, great profit to the library.

The assistant who reads may also wish to own some of the books

he loves, especially those which invite re-reading. The satisfaction to be found in building slowly and carefully a small collection of his own must be experienced by a librarian to be properly appreciated, since books occupy a peculiar position in his life.

A habit of looking through the current issues of magazines of the better literary type often gives excellent returns. New authors frequently appear first in periodicals, and the assistant who finds them for himself may have the opportunity of directing a reader's attention to something which seems worth while. He may experience also the further pleasure of watching the development of the author thus "discovered."

Whatever the incentive, whatever his taste, it cannot be too often said that the circulation librarian *must read*. He should read by instinct and from preference. His interest in books should be involuntary, pervasive. If it is not, he of all readers should know where to go for sympathetic guidance and skilful direction. From those who administer the library or the department, ready help should be available, for himself as well as for the readers whom he must assist.

Through reading the assistant is creating a store not only of an ever-widening mass of knowledge but an understanding of books and their possible relations to every activity of life. He acquires an enlarging vision of their varying uses, and of the great returns to be found in trying to know more books better and better. Whether his taste be natural or acquired, whether his pleasure in reading be instinctive or cultivated, the development of reading habits increases the ability to glimpse and to reach out after those durable satisfactions which come with a recognition of essential values in books as well as in life.

The librarian's pleasure in books is his own, but it may be shared in many quiet ways with those about him. He may from experience have observed that books in masses are formidable to some readers, but through his understanding help the sense of awe which they often inspire may be dispelled and their friendliness

discovered. By having found for himself the books which satisfy and supply food for mental and spiritual growth, the librarian is better qualified to lead others, not only to books but to those broader views which develop as a result of intelligent reading.

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### THOUGHT QUESTIONS

1. Characterize briefly each of the following periodicals of professional interest to the librarian:
  - (a) A. L. A. Bulletin
  - (b) *Libraries*
  - (c) *Library Journal*



2. Consider your personal reading habits. Will these have to be altered to meet your own needs when you are working with the public? In thinking of your equipment for your future work, what advantages and what shortcomings do you find in your choice of books for yourself?
3. Plan a program of "reading with a purpose" for yourself during the next six months.
4. Make a list of the general magazines which an assistant in the circulation department should examine and read regularly. If these magazines have distinctive features, what are they and how are they related to circulation work?
5. Name three book review periodicals which are particularly helpful to circulation assistants. Give reasons for your choice.
6. Give, if possible, instances when you have made use of book knowledge gained from:
  - (a) Browsing,
  - (b) Recreational reading,
  - (c) Casual examination of books,
  - (d) Book reviews,
  - (e) Systematic reading.
7. Discuss the often misquoted phrase of Mark Pattison, "the librarian who reads is lost," in the light of the attitude stressed in this text.



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